DOCUMENT RESUME

ED 230 717 CE 036 101

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TITLE Retirement-Oriented Career Planning in the Middle Years. Final Report on a Study at the University of Washington.
INSTITUTION Washington Univ., Seattle. Inst. for Public Policy and Management.
PUB DATE Jan 82
NOTE 145p.; Conducted with financial support under the Intergovernmental Personnel Act, Grant #80-1903.
AVAILABLE FROM Institute for Public Policy and Management, University of Washington, 3935 University Way, NE, Seattle, WA 98105 ($8.50; 10% discount to libraries, 20% to jobbers).
PUB TYPE Reports - Research/Technical (143)

EDRS PRICE MF01/PC06 Plus Postage.
DESCRIPTORS Adult Education; Career Education; *Career Planning; Futures (of Society); Interviews; *Long Range Planning; *Middle Aged Adults; *Midlife Transitions; *Preretirement Education; Questionnaires; *Retirement; Workshops

ABSTRACT

A 1981 study was conducted to explore and modify both sentiment concerning retirement and its effects on career plans. The study's three principal components were a questionnaire mailed to a sample of 1002 University of Washington nonacademic staff members aged 36 through 55, a "mid-career planning" workshop for 75 questionnaire respondents, and a telephone interview to assess effects of the questionnaire and workshop. The hypothesis tested was that prolonged work participation can be encouraged by promoting early attention to later-year needs and by reducing job demands through part-time work and reduced workloads. The general age vicinity of 48 to 50 years was identified as the threshold of intense interest in planning for the future and retirement. Those respondents interested in part-time arrangements tended to plan significantly earlier retirements. They were in disproportionate numbers when over 50 years old, female, secondary income contributors, and relatively well-educated. Participants felt the workshop's focus on career planning using a long-range perspective was correct. The best features of the three workshops held were combined into a single recommended format. (The final section of the report analyzes the evaluation of the effectiveness of the questionnaire and workshop. Questionnaires, workshop materials, and some data are appended.) (YLB)

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RETIREMENT-ORIENTED CAREER PLANNING IN THE MIDDLE YEARS

FINAL REPORT ON A STUDY AT THE UNIVERSITY OF WASHINGTON

Conducted with
financial support under
Intergovernmental Personnel Act
Grant # 80-1903

January, 1982

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We gratefully acknowledge the help of Thelma Brown, Jacque Heidanus and especially Julie Patchamatla in typing this report; Cho Ming-chi and David Skinner for data entry; and most of all, Barbara Rader for her dedication and enthusiasm in planning and conducting the workshops under the most trying of personal circumstances.

Executive Summary

A 1981 study of University of Washington non-academic staff aged 36 through 55 probed the saliency of retirement and the relationship between retirement awareness and career plans. A second objective was to develop an intervention to draw attention to the long-range implications of career decisions (or their neglect) and cause people to think in terms of late retirement.

Among hypotheses tested were that persons better satisfied with their work tend to plan retirement at an older age and that part-time schedules and reduced workloads are viewed as means of prolonging workforce participation by allowing time and/or energy for adaptive training and by providing relief from excessive demands or stresses of the job. A somewhat more vague object of exploration was the relationship of career orientation to planned age of retirement. It was hypothesized, also, that interventions in the form of a questionnaire and a workshop could influence patterns of thinking about work and retirement.

Principal data sources were 596 questionnaire returns and 121 telephone interviews. The interviews were conducted approximately three months after a workshop, with interviewees in four groups selected in such a way as to allow assessment of the effects of participating in the workshop as well as of completing the questionnaire. The workshop was held somewhat over two months after the first mailing of the questionnaire.

The general age vicinity of 48 to 50 years was identified as the threshold of intense interest both in planning for the future and in planning specifically for retirement. It was also the time when respondents were likely to reconcile themselves to their present jobs and levels of responsibility as being suitable both for meeting their later-year needs and satisfying their career aspirations. The lowest levels of interest in retirement appeared to be limited to persons under 40, and 46 was the threshold age for substantial interest.

Respondents over 49 were also significantly unlikely to expect they would be given additional responsibility on the job. They tended, rather, to be satisfied with their existing level of responsiblity or to aspire to greater responsibility but feel they were not likely to achieve it -- perceptions closely associated statistically with negative perceptions regarding their competitive position in the job market vis-à-vis qualified younger applicants.

Modal planned age of retirement was 65, but more respondents planned to retire before age 65 than at 65 or after. Contrary to our expectation, respondents planning early retirement tended to be the ones who had thought more about when to retire. This may reflect their lesser job satisfaction rather than more knowledge about retirement. But the actuarial bias of social security in favor of early retirement may be a factor. Almost 20 percent of respondents would not venture any estimate of the age at which they might retire.

The strongest correlate of planned age of retirement was accrued retirement service credit. Respondents with the greatest accruals were likely to plan early retirement whereas those with lesser accruals leaned toward retirement at an older age, thus tending toward more or less equalized accruals by the time of retirement. Substantial disparities remained, however: particularly likely to be disadvantaged in terms of final retirement accruals were service/maintenance and secretarial/clerical personnel. The strong influence of retirement accruals on career decisions is probably neither in the interest of productivity nor of worker satisfaction.

Among men, planned age of retirement tended also to be associated with job satisfaction levels (as measured by problems on the job and importance accorded the job in meeting a set of subjective needs). A stronger correlate of planned age of retirement among women was career expectation. In general, women were more likely than men to plan retirement at age 65 or after; those who anticipated growing responsibility on the job were substantially more likely even than other women to plan late retirement -- especially if they were over 45. And it was only among respondents (men and women) wanting but not expecting more responsibility, that older respondents were less likely than others to plan retirement at or after age 65.

Planned age of retirement was also statistically associated with differences in the characteristics that distinguished persons who had considered a change to part-time employment. The preponderant group of respondents who had considered changing to a part-time schedule planned to retire before age 65; they were in disproportionate numbers over 50, female, secondary income contributors, and relatively well educated, and they planned to retire within ten years despite relatively low retirement-credit accruals.

On the whole, as was true with respect to plans for early or late retirement, low job-satisfaction levels were not as important a correlate of interest in changing to part-time work among women as among men. Women who had considered changing to part-time were more likely to be distinquished by their demographic characteristics than by low job-satisfaction levels; those with low satisfaction levels were more likely to have considered changing to a different job rather than to reduced hours.

However, consideration of changing to part time was related to low satisfaction levels among those women who were planning late retirement; presumably early retirement was not a realistic option for this group, largely divorced or widowed and accordingly in need of both the income and additional retirement credit to be derived from prolonged workforce participation. Their interest in working part time was associated with a desire to pursue both job training and outside involvements and they disproportionately wanted more responsibility; part-time work may to some extent have represented for them a next-best substitute for early retirement.

If retirement at or after age 65 is to be encouraged, one should not overlook the significant relationship between early retirement and relatively low job-satisfaction levels and/or relatively negative career expectations. It would appear that a policy of encouraging late retirement demands that organizations develop procedures both to strengthen workers' perceptions regarding the importance of the job as a source of personal satisfaction and to relieve feelings of stagnation on the job through career-progression surrogates to compensate for lack of promotional opportunities and intrinsic work gratifications.

Guided by a thoroughgoing advisory and review process and by participants' evaluations, a workshop format was developed to provide mid-career staff with an introduction to career planning using a long-range perspective. The workshop was held three times, with variations to test the efficacy of slightly differing formats. One expectation was that the workshop would inspire thoughts of changing needs and preferences over time. Over the longer term, it was hoped that early planning might encourage adaptive behavior that would increase the likelihood of a comfortable, prolonged workforce participation. Telephone interviews subsequent to the workshop were designed to assess its likely effectiveness in achieving that objective and to identify any possible effects from completion of the questionnaire itself.

Interviewees were drawn from four groups constituted in such a way as to allow assessment of the effects of workshop attendance and of questionnaire completion. The groups' profiles were identical with respect to age of members and very similar with respect to sex and occupational classification. In retrospect, however, a serious shortcoming was a much stronger career orientation among persons who participated in the workshop.

Workshop attendance was most notably related to more thought of retirement, especially "during the last few months" -- that is, the months following the workshop. Workshop participants were also more likely than other interviewees to expect their work after retirement to be unrelated to existing work or interests. Workshop participation was not statistically associated with consideration of job change or of shorter hours during the period following the questionnaire and workshop.

Completion of the questionnaire was associated with a more thoroughly reasoned approach to job change, a significantly higher response rate in the interview regarding planned age of retirement, and a greater rate of interest in changing to less-demanding duties or reduced work hours at some time before retirement.

The experimental intervention, i.e., study group, was not by itself a factor significantly related to variance in the change in planned age of retirement from questionnaire to interview; it was however, a significant factor in combination with thought given to when to retire and interest in changing to shorter or less-demanding work. Specifically, as compared to the other two groups that had received a questionnaire, mean increase in planned age of retirement from questionnaire to interview was greater among respondents who had attended the workshop if they had also increased their thinking about when to retire or decided against changing to shorter hours or less demanding work. Thus, far from conveying the idea of reduced work involvement as a means of prolonging workforce participation, workshop attendance appears to have had just the opposite effect. This may have been due at least in part to the workshop component on pensions under the Washington Public Employees Retirement System: the formula for calculating pensions uses as base pay the highest consecutive 2- or 5-year period and thus fails to reflect cost-of-living adjustments for employees whose pay immediately prior to retirement is not their highest (thus penalizing persons who phase into retirement). A follow-up interview after a year or two would be useful in identifying changes in retirement plans over the longer term.

A mini-publication is being developed to encourage employers to revamp their personnel policies and procedures to recognize middle-aged and older workers as a valuable resource. It will draw upon findings from this study and related writings to provide a rationale and guidelines both for career-planning support and, perhaps even more important, for developing procedures appropriate to the capabilities and aspirations of an aging workforce.

Only a few summary tables have been included in this report and its appendixes. Complete tabulations and analytic statistics are available for examination at the Institute for Public Policy and Management.

I

INTRODUCTION

Background

Hardly a day goes by without some newspaper, television or radio coverage of the need to prolong workforce participation to an older age. These commentaries generally focus on the inappropriateness of widespread early retirement in terms of its shortcomings for meeting the social and emotional needs of older persons, who are enjoying good health to an ever older age. Alternatively, they focus on the impending financial crisis in the social security or pension funds. The study here reported was an effort to explore and modify both sentiment concerning retirement and its effects on career plans, using as a research population a segment of the workforce for which retirement is still a distant prospect.

The study had three principal components: a questionnaire, a workshop, and a telephone interview to assess the effects of the questionnaire and workshop. The questionnaire was mailed to a sample of 1002 persons, all non-academic staff of the University of Washington (U.W.) between the ages of 36 and 55 inclusive. The 75 workshop participants were selected from among those questionnaire respondents who expressed interest in attending. Finally, telephone interviewees were selected to represent equally persons who had attended the workshop; those who were interested in attending but had not; and those who had received a questionnaire but had not been interested in attending the workshop. A fourth group of interviewees provided representation of persons who had not received the questionnaire or other prior contact from the study.

The questionnaire was intended primarily as an information-gathering tool. However, a secondary purpose gave explicit recognition to the potential influence of survey instruments on respondents' attitudes and orientation. Completion of the questionnaire entailed dealing with questions concerning the importance of the job in the respondent's life; receptiveness to change on the job and mobility between jobs by way of adapting to felt needs; saliency of possible changes in personal needs and job qualifications with the passage of time; and interest in a set of considerations relating to retirement. Questions were grouped under headings providing an explicit contextual framework; every effort was made to convey that context in comprehensive (though of course necessarily very general) terms, to the extent that this was possible without biasing responses. The hypothesis was that by engaging the respondent in long-range career-related considerations, such a questionnaire might trigger further thinking along the same lines and possibly even result in changes in career direction to facilitate later retirement.

The workshop had the same objective. Career-assessment workshops abound; retirement planning seminars are almost as common. But despite the popularity of writings such as John Bolles' The Three Boxes of Life, a unified approach to work and retirement has not yet made the transition from theory to practical application. This workshop was designed to provide an integrated approach to work and retirement planning. A thorough advisory and review process was used to develop a format that would give expression to the principal concerns of values clarification, career planning, career training and retirement planning. The resulting workshop components were put together with slightly varying emphasis in three sessions held at two-week intervals. Limited as it was to three hours per session, the workshop was conceived as an exercise to convey a mode of thought and a stimulus to further exploration. But it was hoped that even this brief exercise might itself in some small way directly affect long-range career thinking.

A telephone interview was used to assess the effect of the questionnaire and workshop on the career and retirement perspective of the respective groups of participants. Most of the interviews took about 10 to 15 minutes, though a few lasted over an hour. No attempt was made in this interview to obtain the interviewee's subjective evaluation of the workshop or questionnaire (evaluation forms were handed out at the conclusion of each workshop). Rather, the interview dealt in less structured form with some of the same questions contained on the questionnaire. Interviewees were classified according to whether or not they had received a questionnaire; if they had, whether or not they had been interested in attending the workshop; and if they had been interested, whether they had actually attended. This made it possible systematically to evaluate the interview responses for any changes that had occurred during the two-month period before the workshop.

Based upon findings from an earlier study of preretirees and retirees, one hypothesis of this study was that the planned age of retirement was directly linked to satisfaction on the job -- that is, that the persons whose personal needs were well met by their jobs were likely to work to an older age. Because of its potential for offering relief from problems on the job and/or freeing time for outside interests, it was further hypothesized that transferring to a part-time schedule or a reduced work load might also serve to prolong workforce participation. The questionnaire was therefore used to test the relationship between various satisfaction elements and interest in changing to a part-time schedule or reduced work load as well as the relationship of both of these factors and various demographic factors to the planned age of retirement. Analysis of the interview responses focused to a considerable extent on changes between responses given on the questionnaire and in the interview. Of particular interest were changes in the planned age of retirement, in thought given to when to retire and what to do in retirement (including work plans) and in interest in shifting to a part-time schedule or reduced work load. It was thought this approach would contribute insight into and identify factors related to decisions concerning work and retirement, thus increasing general understanding of those decisions and possibly suggesting useful strategies for encouraging prolonged participation in the workplace.

The Participants: Questionnaire, Workshop, and Sample

The Questionnaire

The questionnaire for this study contained questions grouped into seven categories, dealing respectively with: the importance of the job in the respondent's life; changes in feelings about the job over time; work plans for the future; interest in training; alternative work schedules and other arrangements; planning ahead; and personal characteristics. Development of the first and last categories used as a point of departure the corresponding section of a 1978 study of pre-retirees and retirees.

The sample was drawn from a complete payroll roster of all U.W. non-academic staff aged 36 through 55, excluding only those employed at Harborview, one of the University's two teaching hospitals. This group was excluded in order to bring the occupational profile of the research population more nearly into conformity with the general norm. In other respects, the U.W. staff of approximately 9,000 constitutes a microcosm of the larger workforce, representing virtually every imaginable occupation. Because one object of the study was to determine whether there is an age threshold below which retirement-related questions are considered irrelevant, it was important to give equal representation to each age cohort. Accordingly the roster was broken down into one-year strata according to date of birth; these strata were then randomly sampled. Questionnaires were identified by number, both to enable us to identify non-respondents for the follow-up mailing and to permit categorization of responses by demographic and employment data contained on the printout along with the roster. In this way it was possible to avoid further lengthening of the already long questionnaire and to retain the integrity of its career-planning focus.

The first mailing went out in mid-December 1980. A follow-up mailing with identical questionnaire but different cover letter was sent exactly a month later to all persons from whom there had been no response. The cover letter made explicit the intent that the questionnaire serve the respondent as a self-assessment and planning tool. To encourage this application, the first mailing contained two copies of the questionnaire, one for the respondent's future reference. The original mailing yielded a 40 percent return; the follow-up raised this to 60 percent. The questionnaire and aggregated responses are contained in Appendix A.

The Workshop

Plans originally called for giving first call on workshop slots to questionnaire respondents and then using the University Daily and/or the official weekly University bulletin to advertise remaining openings to other U.W. staff in the 36-through-55 age group. However, 334 questionnaire respondents indicated interest by answering "yes" to question 53 (concerning interest in attending a workshop on mid-career planning), and the three workshops were fully subscribed by contacting fewer than half of these. This level of expressed interest was remarkable: over half of the expressed demand was not satisfied and a number of additional requests were received by phone from persons not in the questionnaire sample.

A roster of persons interested in attending the workshop was compiled from responses to question 53. Names were entered in the order of receipt of completed questionnaires. The unexpected level of interest in attending meant decisions would have to be made concerning a basis for selecting participants. Options considered were to select at random, to give priority to certain groups, or to try to achieve as broad a representation as possible. Given the profile of persons interested in attending, it seemed likely that a random sampling would result in underrepresentation of some groups, men and older persons for example. Nevertheless, the final decision was to select at random; this had the dual advantages of simplicity and of allowing use of the residual group of interested respondents as a presumably unbiased control in assessing the effectiveness of the workshop.

To minimize the number of no-shows, pre-registration was made a prerequisite for obtaining a place in a workshop. The pre-registration form offered a choice of three dates on three different days of the week (see

Appendix D) and it was possible to accommodate expressed preferences almost without exception.

Interview Sample

The telephone interviews to assess immediate effects of the workshop, as well as possible effects of the questionnaire itself, were begun approximately two months after the last workshop.

The original study design called for three groups to be interviewed, representing in equal numbers questionnaire respondents who had attended the workshops, respondents who had expressed interest in attending but had not attended, and respondents who had indicated on their questionnaire that they were not interested in attending. The decision was made to add a fourth group to represent persons not previously contacted by the study (i.e., who had not received a questionnaire). The rationale was that such a group could serve as a control for any effects from the questionnaire itself with respect to those questions that did not require pre/post comparisons (since by definition this group would lack the "pre" data).

Persons to be interviewed were randomly drawn from their four respective groups stratified by age into 4 strata. The sample was subject to the additional constraint that each (five-year) stratum would contain at least one male and no more than two persons with the same occupational classification. The first three groups consisted exclusively of persons whose previous questionnaire returns betokened some degree of sympathy or at least cooperation with the study; persons who neglected or refused to complete a questionnaire had already been self-eliminated. In contrast, the fourth group had undergone no such screening and there was some delay entailed both in locating several of these persons and in making substitutions to achieve desired quota in the face of a number of refusals. Thirty-two names were drawn for each of the four groups, with a completion target of thirty per group. However, the groups finally numbered 32, 32, 30 and 27, respectively.

II

RETIREMENT PLANNING

Two hypotheses impelled and undergirded this study; both rest on the assumption that it is desirable to prolong the period of satisfying and productive participation in the workforce. It is the principal burden of the study to test the hypothesis that such prolonged participation can be encouraged by (1) promoting early attention to later-year needs and (2) reducing the demands of the job through part-time work and other alternatives to linear careers pursued on a full-time basis.

This chapter will explore the level and locus of concern about later-year needs, with special emphasis on the threshold age of such awareness. The sample will be carefully analyzed with respect to the age at which they plan to retire and how this relates to their involvement in career planning and to their attitudes toward their work. The association between retirement plans and interest in part-time work, reduced workloads and other alternatives work forms will be examined in Chapter III.

Salience of Later-Year Needs and Limitations

Age Thresholds

Is there a threshold age at which retirement and more generally, later-year needs become salient? Identification of such a threshold age was one of the principal concerns of this study. Questions related to planning in general, and particularly to planning for retirement, are found on the next-to-last page of the questionnaire. Responses were first analyzed for their distribution over a seven-point scale, then for any ordinal relationship to the age of the respondent, and finally, for any obvious dividing line that appeared to mark a pronounced change in level of interest or awareness at some particular age.

As may be seen from the response tallies on page 111, responses to these questions tended to have a negative skew. Most notably, respondents tended to respond positively to questions dealing with their involvement in planning (question 37); the extent to which they expected the job to meet their needs as they approached age 60 (question 38); and the amount of thought they had given to when to retire, what to do then and, especially, how they would support themselves in retirement (question 41). Moreover, on all these questions the strength of the (positive) relationship between the respondent's age and concern for the later years was so strong as to rule out its occurring by chance more than eight times in ten thousand. (In the case of concern over when to retire or what to do then, the ordinal relationship with age was such as would occur by chance less than one time in ten thousand).

Perhaps even more interesting from the perspective of this study was the marked disparity between persons below age 50 and those 50 and over in percentage of respondents answering at the positive extreme. Clearly, there does appear to be an increased intensity of interest at 50 or 51 in planning generally, and in particular, in concern with retirement. At the other end of the spectrum, age 44 appears to be the limit of total disregard for planning, and notably few respondents aged 40 or over admit to extremely low levels of planning for when to retire, what to do in retirement or how to support themselves in retirement. Of respondents overall, only 23 percent say they have given no thought (values "0" or "1") to when to retire; 20 percent, no thought to what to do in retirement; and 14 percent, to how to support themselves in retirement. But among persons below 38, the respective proportions marking the "0" or "1" value were 48 percent, 41 percent and 32 percent.

Again it was the group under 40 who in disproportionate numbers said their job would not suit their later-year needs. Forty-one percent of persons 36 and 37 and 26 percent of those 38 and 39 answered "no" to question 37, as compared to 20 percent of respondents overall. The sense that the job will suit their needs as they approach 60 takes a dramatic jump after age 45 and again after age 49. Whereas only 35 percent of respondents of all ages feel their job will be appropriate to their later-year needs, 45 percent of those over 45 feel prepared in this way and 48 percent of those over 49. Of persons aged 54 or 55, only 7 percent answered "no" to the question, and for the age range from 48 through 53 the percentage of all responses at the negative extreme holds fairly constant around 15 percent, all well below the negative response rate for the entire group of respondents.

The statistically highly significant age distribution of responses regarding preparedness for later-year work needs becomes more compelling, however, when viewed in the light of respondents' career attitudes. Older respondents, it seems, tend to be far less sanguine about their opportunities in a competitive job market than do younger ones. Cases in point are greater attachment of older workers to their present job (question 17); negativism concerning chances of getting a job in competition with an equally qualified younger applicant (question 22); significantly lower rate of having obtained a new job as a result of enrollment in a training program (question 29); and perhaps most explicitly, career attitude as reflected in response to question 16. The last warrants a brief description.

The response distribution to this question by age was by all statistical measures highly significant -- so significant as would have happened by chance only one time in 10,000 if the age groups had all been one uniform population. Since they include all but 5 percent of the responses, only the three most prevalent response categories will be discussed here.

Persons who indicated satisfaction with the level of responsibility they had were disproportionately aged 49 or over, and there was a notably small number of persons aged 36 through 39 among them. Respondents anticipating increased responsibility included an inordinately large representation aged 38 and 39 -- almost three-quarters of that age group as compared to well under half of respondents overall, and relatively few persons aged 50 and over. But most revealing in the present context was the age distribution of persons who said they would like a chance to do more responsible work but did not think they would have a chance to. Persons under 40 were notably underrepresented in this response group, as might have been expected. More remarkable, however, were the disproportionate numbers aged 50 and over, and 50-51 was in fact the modal age grouping: 37 percent of persons in this age grouping said they would like (but doubted they would achieve) more responsibility, as compared to 25 percent of respondents overall. Moreover, respondents who did not anticipate growing responsibility had disproportionate interest in changing jobs, given the existence of opportunities for middle-aged persons (question 23), but were significantly unlikely to feel they had a chance in competition with an equally qualified younger applicant (question 22). These findings make it somewhat more difficult to be reassured by the disproportionately large number of older respondents who said their job would suit their needs as they approach age 60: in large measure those responses were probably an expression of resignation to the status quo in the face of perceived lack of opportunity for change.

Work Accommodations Anticipated

Altogether, 204 respondents said they thought their jobs would not or probably would not meet their work needs as they approached age 60; 197 answered the subsequent question, relating to how they would respond to that problem (question 39). Men tended to be more inclined toward trying to achieve an accommodation on their present job, either by having it redesigned or obtaining a reduced work schedule or additional training. Women were more likely to think they would obtain training for a new job or to get a new job without training.

The difference between men and women in anticipated response to changing needs may to a considerable extent have been a function of the significantly greater accrued retirement credit and general level of job held by men, which would give them more of a stake in maintaining the status quo. The difference between male and female respondents with respect to accrued retirement service credit was such as would occur by chance only one time in 10,000, and positions classified as administrative were held by only 7 percent of women but 18 percent of men. Moreover, 56 percent of male respondents but only 37 percent of females said they supervise two or more people (question 48), again a distribution that has less than one chance in 10,000 of occurring by chance. To a considerable extent, however, this relationship is itself a reflection of time on the job. When women are compared with men having roughly the same amount of accrued retirement credit, the overwhelming difference in supervisory responsibility pertains only to the group with less than 10 years' accrued credit.

In terms of occupation, it was persons in secretarial/clerical and service/maintenance positions who far disproportionately said they would accommodate by obtaining training for a new job (52 percent of secretarial/clerical and 57 percent of service/maintenance personnel as against 44 percent of respondents overall) while persons in the administrative and paraprofessional classifications (disproportionately held by men) checked job redesign (33 percent as compared with 17 percent overall). However, the largest group of administrators (38 percent) said they would probably change jobs without new training if their job no longer suited their needs.

Retirement Work and Schooling Plans

Only 49 respondents said they planned not to do any work, paid or unpaid, after retiring. Part-time work was the employment choice for the retirement years (question 45), checked by 154 respondents. This was almost two-thirds again as many as the number (93) who thought they would run their own business or independently practice a profession, which was second; occasional work was third in frequency of response (92); volunteer work and free lancing, fourth and fifth with 86 and 79 respectively. Plans for part-time work were most prevalent among persons 50 and over, and a disproportionate number of persons aged 41 and 42 were thinking of going into business or practicing a profession on their own or free lancing; otherwise the various types of working arrangements were fairly evenly represented at all ages.

Altogether, 25 percent of respondents said they thought they might attend school after retirement (question 31). Plans for attending school after retirement varied directly with age; the odds are only one in a thousand that the concentration of interest would by chance increase with advancing age to the degree evidenced by these responses. The proportion increases abruptly at age 46 and continues upward thereafter, reaching a plateau of about 38 percent of respondents from age 50 on. But even the percentage among persons aged 50 and over is not very impressive when compared with the 246 who indicated they might attend school while working full-time, and, interestingly, those plans are significantly more likely the younger the respondents and notably unlikely among respondents over 50.

Planned Age of Retirement

Though the modal planned age of retirement was 65, the median age was only 62.4. This section describes the sample population in terms of the age at which they plan to retire and probes the characteristics that seem to d tinguish early- and late-retiement planners with respect to involvement in pla pension eligibility, demographic and occupational characteristics, work orientation and plans and inclinations for the future. Chapter III contains a detailed examination of alternative work patterns as they relate to planned age of retirement.

Planning as a Factor

Intuitively, it is natural to make a connection between planned age of retirement and long-range career planning. One would think that any concept of long-range work plans or of what to do after retirement would use as a reference point some date consciously or unconsciously targeted for withdrawal from the work force.

It was therefore surprising to find that for the group as a whole, there was no statistically significant relationship between planned age of retirement and impressions as to whether the job would be suitable to a respondent's needs in the later work years (question 38)--or as to how such shortcomings as were expected could be overcome (question 40). However, the age planned for retirement was statistically related (in some way) to most of the other variables having to do with expectations concerning work involvement, albeit in some cases only among a particular subgroup of respondents. Again consistent with intuitive impression, age of planned retirement was related to a number of attitudinal factors having to do with job satisfaction and career expectations.

Oddly, among male respondents, self-image as a planner or a goal-setter (question 37) bears no discernible relationship to planned age of retirement. Among female respondents, however, there is a statistically significant direct ordinal relationship between planned age of retirement and self-image as a planner: women who plan more tend to plan to retire later. Seemingly somewhat contradictory to this is the relationship between planned age of retirement and thought given to when to retire and, even more contradictory, thought of what to do after retirement (question 41). Persons planning to retire early tend to have given considerably more thought to when to retire than have those planning later retirement and this correlation is statistically significant for the population at large and for men but falls just short of statistical significance at the .05 level among women -- women planning retirement at ages 65, 66, and 67 tended disproportionately to mark the moderate rankings rather than the lowest ones. Thought given to what to do after retirement bears a highly significant negative correlation with planned age of retirement among both women and men. Both men and women planning retirement at age 65 or later tend to have given notably less thought to what to do after retirement than do those planning to take early retirement.

Age and Other Demographic Factors

Though there was no systematic ordinal relationship between present age and age of planned retirement as stated on the questionnaire, there were highly singificant differences between the various (two year) age groups in terms of planned age of retirement. Moreover, as described in the next chapter, among persons who had no interest in part-time employment, age was a strong correlate of planned age of retirement.

The bracket 64 to 68 is the modal planned age of retirement for all except the oldest and youngest two-year age groups (36, 37 and 54, 55); for the youngest group it is a close second to 57 through 60, but for the oldest group, it is a distant second to 61 through 64.

Even though a disproportionate number of respondents in their fifties plan to retire between 61 and 64, almost 30 percent of respondents aged 54 and 55 plan to retire between ages 69 and 72. And though persons under 44 tend to plan to retire relatively early, of the 42 aged 36 and 37, 14 (33.3%) plan retirement after age 68 or "never" as compared with 13.2 percent of respondents overall. Moreover, the odds were that someone planning retirement after 72 was probably no more than 45 years old.

Age of planned retirement did not appear to relate significantly to occupational classification or to the respondent's formal educational attainment. Women were more likely than men to plan retirement at 65 or after.

Reasons Given

Reasons given for the age planned for retirement (question 43) did not seem to fall into any age pattern nor were older respondents significantly more likely to respond. Overall, the principal reason given was to allow time for other things, mentioned by 111 respondents, and this was notably evenly distributed with respect to age of respondents. Not so evenly distributed was the second most frequently given reasons, pension eligibility: this was mentioned by 91 respondents but by few persons under 40. The third reason, need to continue working, was mentioned by 75, again evenly distributed in terms of age. For a complete frequency tabulation, see page 115, Appendix A.

Pension Eligibility and Accrued Retirement Service Credit

It is interesting also, that 57 through 60 is the second most frequently mentioned planned age of retirement overall and 61 through 64 is the third. One likely inference would be that this sample is influenced more strongly by retirement eligibility (age 60 or, if hired after September 1977, 55, actuarially reduced) than by the threshold age for (partial) social security eligibility (age 62). As mentioned on the previous page, however, among persons in the oldest age group, 61 through 64 is by a wide margin the modal planned-retirement age range--no doubt social security eligibility is the governing factor here. Does this group then have relatively little accrued retirement credit and is retirement credit an important factor?

The hard data tend more than to support the importance of pension eligibility as a determinant of planned retirement age. Tabulation of planned retirement age against present accrued retirement service credit yields a correlation that would occur by chance only one time in ten thousand. Moreover, if one looks at the sample in four separate age groups one finds a highly significant correlation in all of them, though the strength of relationship is somewhat less among persons under 40 and among those over 50. Furthermore, though women's present accrued retirement credit is itself lower than men's to a most significant degree, accrued retirement credit is no less related to planned age of retirement among women than among men. Nor does the overall household income appear to have much bearing on the relationship between accrued retirement credit and planned age of retirement. Only 17 (17%) of the 99 respondents with household income under $15,000 plan to retire by 60 and only 38 (38%) by age 64, as compared with 35 percent and 44 percent overall. But though persons in this sample plan to retire very significantly earlier the higher their household income and those early retirees also tend to have the most accrued retirement service credit, controlling for the income factor does not undermine the strength of relationship between planned age of retirement and accrued retirement credit.

Nor do other objective characteristics of the respondent appear to have much bearing on planned age of retirement. Although there is a strong ordinal relationship between level of occupational classification and retirement credit, plans as to age of retirement are not statistically related to occupation. Nor are they related to level of educational attainment (so one cannot say that future cohorts, who have spent more time in school are likely to work to a more advanced or less advanced age). Respondents with a greater share of responsibility for their household's income (question 50) do tend to plan a somewhat later retirement and the chief breadwinner tends also to have more retirement credits; thus controlling for this factor very slightly reinforces the underlying strength of relationship between planned age of retirement and accrued retirement service credit--presumably if all respondents contributed the same share of their household's income the strength of relationship would be greater still.

The strong correlation between retirement credit and planned age of retirement is remarkable in a sample for most of whom retirement is still a remote prospect--median number of years to planned retirement was 15. (For that matter, it is remarkable also that knowledgeability regarding the amount of accrued retirement credit, as measured by the accuracy of response to question 44, does not appear to relate to age in any way--younger respondents were not significantly less accurate.) It is especially interesting, however, for its implication with respect to anticipations concerning accrued retirement credit by the time of retirement. The strong inverse correlation means that if respondents proceed as planned, differences in earned credit will tend to lessen as persons with less credit work to a higher age to compensate. A variable was computed to reflect the amount of retirement credit that will have accrued by the time of planned age of retirement. Tabulation of this variable against household income shows no significant differences among different income groups--in marked contrast to retirement credit already earned (which, as already mentioned, relates directly to total household income). Despite this leveling effect, certain types of respondents do expect significantly greater total retirement credit than others. Cross-tabulations yield a profile of the well-endowed (in terms of retirement credit) retiree as being male, principal breadwinner, and administrator--all with a statistical probability of less than one chance in a thousand of being due to chance in a uniform population. These respondents tend also to anticipate increased responsibility on the job (question 16).

Whereas the median total anticipated retirement credit was just over 24 years, 61 percent of male respondents expected more than that as compared with only 42 percent of women; and 72 percent of administrators expected more as compared with 51 percent of professionals, 56 percent of paraprofessionals, 57 percent of skilled craftspersons, and 62 percent of security personnel, but only 41 percent each of secretarial/clerical and maintenance/service personnel.

We cannot, of course, be sure whether respondents who already have relatively high retirement credit have deliberately stayed within the PERS system as part of a plan to retire at an early age or plan their retirement date with some pension goal in mind. The first alternative does, however, receive some support from the number and distribution of responses to question 19 citing accrued retirement credit as a deterrent to job change. Persons planning to retire before age 65 were significantly more concerned about this factor than were those planning later retirement. Without hazarding a guess as to causal relationships, however, it seems safe to infer that even absent precise knowledge of their accrued credit--only 193 responded correctly to the question asking their retirement credit (question 44)--that credit figures importantly in their career plans, whether consciously and precisely or otherwise.

If retirement service credit is indeed a driving factor in retirement decisions, this probably means that options as to retirement age are largely foreclosed fairly early in the career. Among those who early established a vested position, there is a strong deterrent to mobility out of the system. And among those who have not established a vested position, circumstances dictate prolonged work participation in order to amass a meaningful amount of credit. Neither circumstance is conducive to job satisfaction or enthusiastic performance. By way of confirmation, persons close to retirement were more likely than others to feel bored, anxious and frustrated about their jobs (question 8)--even though incidence of those feelings did not relate to age or planned age of retirement, the two source variables.

They also were far more likely to feel that their work was too demanding (question 16).

Subjective Factors

Notwithstanding the absence of statistical relationship between planned age of retirement and general job attitude, a number of variables reflecting job satisfaction levels do seem to relate significantly to the planned age of retirement. For the most part these are the elements in questions 4 and 5; their general distribution is described here by way of background for their association with planned age of retirement.

As may be seen from the questionnaire response frequencies in Appendix A, respondents in this sample tended to feel their job was extremely important in meeting most of the needs listed in question 4 and preponderantly minimized the importance of problems encountered on the job. Preeminent among needs met was the feeling of being useful; personal growth was second. The problem most frequently cited was lack of recognition, with the need for more feedback second; even these had relatively few responses at the "quite a bit of a problem" end of the scale, and they are perhaps more noteworthy for also having relatively low frequencies at the "not at all" end. Only one of these variables, the need for a regular way to occupy time, is statistically related to the age of the respondent. Interestingly this is the only variable in the "needs" group (question 4) or the "problems" group (question 5) that does not have a heavily skewed response pattern, but older respondents tend to value the job somewhat more highly than younger ones for its role in meeting this need--though even here the relationship is not a very strong one.

As for formulation of plans for when to retire: certainly such factors as the needs met by the job and problems encountered on the job do not appear to be nearly as important a factor as retirement service credit. Of all the variables included in those questions, only one, problems with co-workers, is significantly related to planned age of retirement for both men and women. Among men, planned age of retirement is also related to the importance of the job in meeting needs for personal growth, status, usefulness and recognition. The composites of needs met by the job and problems encountered do not appear to bear a significant relationship to planned age of retirement.

Closer scrutiny of tabulations of some of the needs-fulfillment and job-problem variables sheds some light on the difference between men and women with respect to the relationship of these variables to planned age of retirement. Male respondents planning retirement at or after 65 constituted a far disproportionate number of persons to whom the job is extremely important (value 5 or 6 in question 4) as a source of useful work, recognition and status in the working world, and to a slightly lesser extent, personal growth. Stated somewhat differently, in our sample, men to whom the job is important in meeting these needs tend to plan later retirement than do other men. Of men to whom the job is extremely important in providing status in the working world, almost 55 percent plan retirement at or after 65 as do over 48 percent of those to whom it is important as a source of useful work, 49 percent of those who value it for the recognition they get and 61 percent of those who value it for personal growth; this compares to only 41 percent among male respondents as a whole. The corresponding proportions for women are that 43 percent for whom status is very important, 57 percent for whom the job is very important as a source of useful work, 42 percent who value the recognition and 51 percent of persons valuing the personal growth plan retirement at or after 65--compared to 47 percent of all female respondents.

These figures are revealing in a number of respects. To begin with, a considerably larger percentage of women plan to retire after age 64 (47 percent as compared to 41 percent of men). Secondly, among respondents to whom the job is important in meeting needs for personal growth and useful work, at least as great a proportion of women as of men plan late retirement; however, they are not significantly different in this respect from other women and don't constitute a disproportionate number of those planning late retirement. Finally, one should note the marked difference between men and women planning late retirement with respect to the importance of the job in meeting their needs for status in the work place and for recognition or esteem. In marked contrast to the male respondents, women for whom the job is important in meeting these needs were actually statistically underrepresented among those who planned to retire at or after age 65.

The only (job-related) problem associated with planned age of retirement was that of strained relations with co-workers. Among men this was a highly significant ordinal relationship: the more importance assigned strained co-worker relations, the lower the age of planned retirement. Among women the relationship was not quite as consistent: though women with the lowest level of strained relations with co-workers were overrepresented among persons planning to retire at ages 69-72, the same was true to only a slightly lesser extent of women planning retirement between 53 and 56.

Because responses were so heavily concentrated at the low end of the scale (indicating no problem), really meaningful Ns are not encountered above level 3. But at that level the largest proportionate group of respondents plan retirement at ages 61 through 64 as compared with 65 through 68 for women ranking this problem "1" and 69 through 72 among women who rated it "0," or not at all a problem. The single other source of dissatisfaction related to planned age of retirement was the feeling of very little follow-through on their work once it was out of respondents' hands (question 6). Respondents as a whole tended to plan early retirement in direct proportion to the extent to which they felt their work did not accomplish the results they wanted once it was out of their hands.

With the exception of strained co-workers relations and perceived lack of follow-through, then, such problems as are encountered by our sample on the job seem not to be significantly related to plans as to when to retire; nor, among female respondents are the needs that are met by the job. But though there is no significant relationship for the sample as a whole, among men, planned age of retirement does seem to be related to the job's role in providing a sense of usefulness, recognition, status and personal growth (question 4).

Planned age of retirement appears to relate somewhat more directly to factors having to do with career development. Persons who indicate in their response to question 16 that their work is too demanding tend to plan earlier retirement than do others, and those who feel they have reached the limit of growth on the job (question 15) are also somewhat more likely than others to plan early retirement. The pattern of responses as to desirability and likelihood of respondents' assuming additional responsibility (question 16) is described here in some detail to further characterize persons planning early and later retirement.

Overall, respondents expecting an increase in responsibility tended to plan to retire significantly later than did others. A fairly uniform 50 percent of respondents with high career expectations planned retirement at or after age 65 irrespective of age even though career expectations diminished to a statistically significant extent with advancing age. Recall the median for the entire sample was 62.4 years.

Table 1. Late-Retirement Planners as a Percentage of Career Expectation Categories, by Age Group

Age		Anticipate More Responsibility	Want More Responsibility	Satisfied As Is	Late Retirement Planners Overall	(Others
	n =	107	57	46	216	6)
36-40	50	49.2	55.0	46.7	49.4	
41-45	56	48.9	48.6	52.0	49.5	
46-50	53	52.6	40.7	33.3	43.4	
51-55	57	51.1	40.9	36.6	42.2	
Entire Sample	216	50.5	45.2	40.5	46.0	

Table 1 shows the representation of respondents planning late retirement as a proportion of the (question 16) career expectation responses in four age strata. It is apparent from the summary data at the bottom that respondents with the highest career expectation are far more likely to plan late retirement than are those who want more responsibility but do not believe they will achieve it, and persons satisfied with their present level of responsibility are least likely of any of these categories to plan late retirement (the few who said their work is too strenuous are still less likely to retire late). Equally apparent is that with advancing age, representation of late-retirement planners declines among persons wanting but not expecting increased responsibility--in contrast to the (already discussed) fairly steady representation among persons expecting increased responsibility. Persons who are dubious of their prospects for advancement, it appears, tend with advancing age to become more interested in early retirement. Finally, those who say they are content with existing circumstances present a more erratic picture: late retirement planners are overrepresented (as compared to their presence for the age group over all only in the group aged 41 through 45, but non-advancement-oriented respondents 45 and under are far more likely to plan late retirement than are those over 45. The differences in representation of late-retirement planners among different age groups (far right column) are not statistically significant.

When responses of men and women were analyzed separately, however, it became apparent that the statistically significant difference between retirement-age plans of persons with upward expectations and others maintained only among women: of the 119 (43%) women expecting increased responsibility 65, representing 55 percent, planned to retire at age 65 or later as compared to only 48 percent of all female respondents. Further support for upward career orientation as a correlate of planned age of retirement came from the question asking respondents to indicate whether they have recently considered making a job change for the sake of better pay or opportunity (question 34e). Persons who answered "yes" tended to plan later retirement than those who said "no," and again it turned out that the statistically significant relationship did not apply when only men's responses were looked at.

Reflections on Early Retirement

Contrary to our hypothesis, respondents who had given more thought to when to retire and what to do then tended to plan relatively early retirement. This posed the problem: If focusing attention on the question results in plans for significantly earlier retirement, rather than later retirement as we had assumed, what is the reason for this and how can people be persuaded that it is in their interest to delay retirement?

Some clues are available from the demographic and career-related characteristics of respondents planning early retirement. Among men, planned age of retirement tended to be associated with the perceived importance of the job in meeting their subjective needs: male respondents planning to retire before age 65 tended to feel their job was relatively unimportant in this respect. A more important factor among women was career expectations: women who planned early retirement tended not to expect that they would be given additional repponsibility on the job, even if they aspired to increased responsibility.

The importance of career advancement to female respondents receives further support from patterns of job-change consideration relative to low perceived needs fulfillment by the job. These patterns are discussed in detail in chapter 3 and only summarized here within the context of their involving the same variables as are associated with early retirement. Whereas men with relatively low perceived needs fulfillment tended more than other men to consider changing to less demanding or part-time work, among women a more likely related action was to consider changing to another job, likely one that offers better pay or opportunity--again the career emphasis. Women interested in part-time work, on the other hand, were more likely to be distinguished by their demographic or occupational characteristics.

The foregoing suggests that these male respondents may tend to consider both early retirement and a change to less-demanding or part-time work when the job is seen as relatively unimportant in meeting their needs.

They may well see less-demanding and/or part-time work as a transitional step perhaps to another job, vocation or avocation. But women plan early retirement and part-time work in significantly disproportionate numbers because relatively little sacrifice is involved if they are secondary breadwinners -- and their relatively low pension entitlements are very likely less important sources of retirement income as well. Those women, who have become frustrated in their efforts at advancement, may see part-time work as a comfortable way of continuing on the job to the age at which they become eligible for (early) retirement.

But most of the respondents, both male and female, planned to do some kind of work after retirement. They may have been attracted by the idea of early retirement at least in part because it allowed pursuit of new goals. In effect, it seems retirement was seen as a mechanism for shifting gears, by those for whom the pre-retirement workplace offers no such mechanism.

It appears, however, that early retirement has adverse implications for both the pension plan -- at least in the short run -- and the individual. The pension plan must pay out earlier, which may constitute a hardship on the fund even though the annuity is smaller than it would otherwise be. At the same time, even individuals who do work after retirement move to what may well be the first step toward not-too-distant removal from the workforce. Our recent study of retirees showed a strong inverse correlation between years since retirement and amount of work involvement in the five years following retirement -- irrespective of age. If mainstreaming is desirable, then early withdrawal from the workforce is not.

Current uncertainties about not only pension systems but even social security impel toward retirement without delay. Moreover, current provisions regarding the base pay used for calculating benefits act as a disincentive to continuation in the regular workforce in either a less-demanding or a part-time job. (The base period is the one with highest salary--which may be several rounds of inflation back.) Thus on the surface, retirement may seem like the most attractive option, offering as it does what is seen as a new start with pension income on the side.

If needs fulfillment and career expectations are indeed as closely associated with age of planned retirement as our findings suggest, it would seem some delays in retirement could be brought about through actions designed to manipulate these two factors. If there is no room at the top, and only limited scope for advancement, there are other forms of incentives and rewards. Job rotation, sabbaticals, training specific to the job, broadening familiarity with the organization at various levels and with the rationale behind policies and procedures, increased use of employee suggestions--the variety of possibilities is no doubt constrained only by the limits of the imagination.

Age of Retirement Unknown: A Distinctive Group

One aspect of the nature of the relationship between planned age of retirement and other variables that should not be overlooked is the profile of the 108 persons who answered "don't know" to the question of when they thought they would retire, or left it blank.

Several attributes predominated among this group. As might have been expected, persons who did not know (or declined to reveal) the age at which they thought they might retire, recognized in far disproportionate numbers, that they do not plan or set goals. Ten percent of this group checked "0" or "1" in question 37 as against only 4 percent among respondents overall, and only 25 percent marked the two highest boxes as compared with 32 percent overall. They also recognized in disproportionate numbers the unsuitability of their job for meeting their needs as they approached age 60: 51 percent of this group said the job would not or probably would not be suitable as compared with 39 percent of respondents overall, and only 25 percent thought it definitely would, as compared with 35 percent of all respondents. Moreover, they were far disproportionately represented among persons who had given the least thought both to when to retire and to what to do once they did retire (question 41a and 41b): they accounted for 33 percent of all persons giving this answer to question 41a and the disparity was even greater with respect to question 41b. They had a remarkable disproportionate representation among persons who said they were not interested in obtaining any more job training (10 percent vs. 5 percent of all respondents) and, finally, they were much less likely than other respondents to feel good performance on their part was rewarded by improved relations with their co-workers (only 37 percent checked values "5" and "6" as compared with 45 percent overall). As might be expected, they were notably underrepresented at our workshop: only 9 attended (representing 8 percent as compared to 12 percent of respondents overall).

In short this group, the persons who are not prepared to give an estimated age of retirement, presents a profile suggestive of predominantly externally controlled behavior. The group, whose mean age is now 44 1/2, represents over 18 percent of respondents in this study, and according to present indications will move into retirement with very little concern about their retirement needs, awareness of available options at various steps along the way, or even interest in changing direction. A program is needed to arouse these people with minimal demands on their time and energies, to the benefits to be derived from their taking hold of the reins and determining the direction of their job paths.

Summary

Workers aged 50 and over appear to share certain characteristics with respect to plans for their later years--characteristics that distinguish them from their younger co-workers. Respondents over age 49 tend to be very significantly more interested than others in thinking about and planning for their future regarding either when to retire, what to do after they retire or how to support themselves financially once they have retired. These questions were of especially little concern to respondents under 38. Respondents over 49 were also significantly more likely to be satisfied with their present level of responsibility or to think they wouldn't be given a chance to do more responsible work; these responses were strongly associated with negative perceptions regarding prospects of obtaining a job in competition with younger applicants. Thus perhaps it was in resignation that they tended to consider their jobs as suitable to their long-range needs.

Fewer than one in ten respondents planned not to do any work after retirement; part-time employment was by far the most frequently checked working arrangement. Again, those 50 and over were significantly more likely both to plan to work part-time when they retired and to plan to attend school when they retired. In contrast, interest in attending school under any circumstance other than retirement was significantly less among respondents aged 50 and over.

There is an extremely strong inverse correlation between planned age of retirement and accrued retirement service credit -- one so strong as to be little affected by controlling for any of a variety of demographic factors associated with both. This correlation reflects a leveling in the amount of accrued credit among different income categories as persons with lower total household income and less accrued retirement credit reject thoughts of job change and/or plan to work to a higher age, often with considerable detriment to their enthusiasm on the job as they approach retirement.

A smaller proportion of women than of men in this study anticipated increased responsibility on the job. Also, the proportion of all respondents expecting increased responsibility tended to decrease with age. Respondents with higher career expectation tended to plan later retirement, but this tendency was strongest among female respondents and especially among those over age 45. And it was only among persons wanting but not expecting more responsibility, that older respondents were less likely than others to plan late retirement. It was only among men, however, that plans for late retirement were associated with assignment of relatively high levels of importance to the job in meeting personal needs.

If retirement at or after age 65 is to be encouraged, organizations should develop procedures both to strengthen workers' perceptions regarding the importance of the job as a source of personal satisfaction and to relieve feelings of stagnation in the job through career-progression surrogates to compensate for lack of promotional opportunities. But perhaps most in need of support is the substantial group of respondents who, according to present indications will move toward retirement without any preparation in terms of timing or consideration of alternative options along the way.

III

ALTERNATIVE WORK PATTERNS

Interest in changing to a part-time schedule was referred to in the last chapter as a factor that tends to mask characteristics of the questionnaire respondents with respect to retirement planning. This chapter will explore the statistical association between planned age of retirement and alternative work patterns. Through comparisons with persons interested in other types of job changes and with the sample as a whole, characteristics will be identified that distinguish the groups of respondents interested in part-time schedules in their own or another job, particularly as these characteristics help to explain the distinctive retirement plans of persons interested in these alternative work patterns.

Age Related to Planned Age of Retirement: Alternative Work Patterns The Missing Link

As already stated (page 23) for the sample as a whole there is no ordinal relationship between respondents' age and the age at which they plan to retire. It is interesting, therefore, that there *is* a strong, direct ordinal relationship if one considers only those persons who said that during the past year or two they had *not* given any thought to getting their hours reduced to part time. There is a slightly different but also statistically significant relationship between age and planned age of retirement among persons who had *not* thought of changing to a different job to obtain a part-time schedule.

What is the meaning of this tendency for older respondents to plan later retirement only if they have not recently considered changing to part time either in a new job or in their own job? Are the respondents who have not considered a change to reduced work hours perhaps simply a subgroup of those who want to retain the status quo; that is, rather than being specifically disinterested in changing to a part-time job, are they perhaps simply less interested in a change of any kind? The evidence is fairly conclusive to the contrary. The correlation between age and age of retirement fails to appear when one excludes respondents who have considered changing to a less demanding job or one that provides greater opportunities or simply another job for the sake of a change (the other components of question 34).

Thus it appears lack of interest in changing to part-time employment is not merely symptomatic of a negative attitude toward change in general, but rather a factor of and for itself related to planned age of retirement. Among respondents who have considered a change to part-time work, older persons tend to plan significantly earlier retirement than do others, a characteristic that statistically obscures the fundamental tendency of older persons in the sample to plan later retirement. The characteristics of the group that recently considered changing to part-time employment offer important clues as to the type of people by whom this is perceived as a viable option.

Characteristics of Persons Interested in Alternative Work Patterns

In discussing the characteristics of persons who had recently considered a change to a part-time schedule either in their present job or a new one, interest in changing jobs simply for the sake of a change, or for increased pay or opportunity, will be used as a basis of comparison. In this way it may be possible to point out distinctions between persons simply looking for any kind of a change and those interested specifically in part-time work.

Demographic and Occupational Characteristics

A total of 108 women (42%) and 56 men (29%) said they had, during the past year or two, considered making a job change just for the sake of a change (question 34d), and 174 women (49%) and 64 men (29%) indicated extreme interest (values 5 and 6 on question 23) regarding starting on a new career if they thought there were opportunities for persons in their 30s, 40s and 50s. Still greater was the number of respondents who said they had considered a job change for the sake of better pay or opportunities (question 34e): 235 women (74%) and 145 men (68%). Interest in reduced schedules or workloads (question 34a, b and c) was small by comparison: 77 women (31%) and 27 men (14%) had considered changing to a part-time schedule on their present job (question 34a) and the numbers for changing to a job that would allow a part-time schedule were 55 women (23%) and only 14 men (8%). Interest in transferring to a less demanding job was expressed by only 38 women (16%) and 18 men (10%). Note that the disparity between the proportion of men and women is far greater with respect to change involving reduced hours.

Interest in job change just for the sake of a change (question 34d) and especially for increased opportunity (34e) was significantly greater among persons under 40 than among older respondents -- perhaps related to the extremely strong association between higher age and perceived noncompetitiveness vis-à-vis an equally qualified younger applicant (question 22). Curiously, the age distribution most similar to that of interest just for the sake of a change is that of interest in reduced workloads. The hypothesis had been that interest in reduced workloads would be greatest at the other end of the age range. A distinguishing feature of the group interested in a reduced workload, however, was its uniquely appreciably higher mean accrued retirement credit (9.98 years as compared with the overall mean of 7.994 years). The figure was greater still--12.25 years--when only those 16 respondents were considered who had not also indicated interest in change for its own sake. Thus perhaps even the younger respondents in this group had held their jobs for an atypically long time.

Interest in the two part-time alternatives came closer to expectation. Persons who had considered changing to part-time hours on their own job were disproportionately aged either under 40 or over 49 and this was true of both men and women, though in each five-year age bracket the proportion of interested women exceeded that of interested men by approximately a factor of two; the idea did not hold much appeal for respondents in their forties. Over 28 percent of the 103 were under 40 and 38 percent 50 and over, even though those two age groups accounted respectively for only 20 and 32 percent of the responding group. Interest was concentrated among professionals and secretarial/clerical personnel, indeed only 26 of the 103 did not fall into one of these two categories; also disproportionate numbers were unmarried and had advanced degrees. Though interest tended to go up with higher household income, this tendency did not meet our test of significance ($p < .05$). However interested persons did contribute a significantly smaller proportion of household income than those who were not interested.

Of the relatively small group, only 69, that had considered changing to a new job for the part-time schedule, over half were secretarial/clerical and the only other occupational class overrepresented was administrators. Among women, interest was concentrated in the under-38 age group (18) and again most notably in the groups aged 50 and over (34). Of the very few men (10) who said "yes," only 4 were over 44. Persons in this group too, tended to be unmarried, and they included notably few without some education beyond high school. The level of household income was in no way a factor but, as with persons interested in reducing hours on their present job, there were relatively few persons with principal responsibility for their household income. These respondents averaged significantly lower retirement credit than those who had not considered changing jobs to get a part-time schedule; they also tended to plan early retirement.

Job Satisfaction

Differences by Type of Change Considered

Interest in job change simply for the sake of a change was heavily reflective, among both male and female respondents, of more than the usual number of problems on the job and of relatively little importance attributed to the job in meeting the needs for a feeling of being useful and of recognition or esteem (question 4). Interested women also tended to rate the job lower than did others with respect to meeting the needs for personal growth, social contact, and for a place in the working world (especially important to women in administrative jobs). Interested men had more than their share of problems with co-workers and supervisors. Interest in change just for the sake of change was statistically related among respondents aged 45 and under to both low levels of aggregated needs fulfillment and high levels of problems on the job, but problems were most significant a factor among respondents over 50.

Among respondents interested in a reduced workload, women tended to be fairly typical of female respondents over all with respect to most of the elements of job satisfaction in questions 4 and 5; the notable exceptions were that this group felt a significantly greater need for more feedback and had more prevalent feeling of lack of control. However with respect to almost every one of the variables in questions 4 and 5, men who had considered a reduced workload differed significantly from those not interested, in terms of low levels of needs fulfillment and high levels of problems encountered (the only exception was the need for a regular way to occupy time). And among both men and women, those who had considered a change to less demanding work included a disproportionate number of persons who said their work was too demanding (question 16) and who did not feel their work accomplished what they intended once it was out of their hands (question 6)--and these tendencies were statistically even more significant among male than among female respondents but were not apparent among persons planning late retirement.

Looking at male and female respondents together, those over 50 were the only ones for whom recent consideration of a reduced workload was statistically related to both high levels of problems in the aggregate and low levels of needs fulfillment. Relatively high levels of problems were a statistical factor also among the 41-through-45 group and, interestingly, the 46-through-50 group was distinguished by a high level of aggregate needs fulfillment. Although on the surface this is inconsistent with other findings, it actually makes a good deal of sense that a reduction of workload might afford just the relief needed to enable people to remain in situations which basically are very important to them.

Both men and women who had considered transferring to a new job that would allow a part-time schedule differed statistically from other respondents in attributing less importance to most of the needs-fulfillment variables. Among women, perceived lack of control and recognition and strained relations with co-workers posed more of a problem than was to be expected on the basis of the larger female population; and women in this group also included a disproportionate number of those who had said in question 16 that their job was too demanding or stressful. Among men the only significant problems were boredom and, most significantly, the perception of lack of follow-through on their work once it was out of their hands (question 6). However, in the aggregate, relatively low needs fulfillment was again a factor only among respondents over 50; relatively high levels of aggregate problems, among persons in the two five-year groups aged 41 through 50.

As compared to others of their sex, male respondents who had considered changing to a part-time schedule on their present job tended to rate their jobs significantly lower in terms of (aggregated) needs fulfillment and in terms of follow-through on their work once it was out of their hands; women tended disproportionately to experience problems in their relations with co-workers and supervisors and with a perceived lack of feedback on the job. Both men and women said (question 16) in disproportionate number that their job was too demanding and, among late-retirement planners tended to feel a lack of follow-through on their work.

It is noteworthy that the group seeking reduced hours on their present job was characterized by some of the same attitudes as the groups that had considered both change just for the sake of change (described above) and change for the sake of better opportunity or pay, but lodged in the opposite sex. Where among persons interested in reducing hours low needs fulfillment was characteristic only among men, among the opportunity seekers it is the women for whom the job tended to be in highly significant degree less fulfilling with respect to most of the needs listed. Moreover, few problems were disproportionately reported by the shorter-hour seekers and those they did report related mostly to people rather than to the work itself; in contrast, the opportunity seekers--men and even more dramatically, women--were characterized in marked degree by a relative surfeit of most of the work-related problems, though unusual incidence of lack of control and need for more feedback were reported only by women. Again contrary to persons seeking a reduction in work hours, these people were statistically unlikely to consider their work too demanding. When respondents who had recently **considered** a job change for the sake of greater opportunity or pay are examined by five-year age strata, problems are significantly related to consideration of a job change for that reason among all but the youngest (36-40) group, but it is only in the 46-through-50-year group that interested respondents are characterized by both statistically greater problems and lesser needs fulfillment. Recall by way of contrast, that this is the age stratum in which those whose needs were relatively well filled by their job were in disproportionate numbers interested in reduced workloads.

It must be emphasized that these are all comparative observations, noting significant deviations from the profile of respondents of the respective sex or age. Notwithstanding the significantly greater incidence of problems, even the various subgroups described did not report problems of any high degree of severity, and needs fulfillment tended to be quite high even in the cases of groups deviating significantly on the low side. It is none the less noteworthy, however, that with respect to interest in each one of the job changes in question 34, relatively low levels of needs fulfillment and relatively high levels of problems are characteristic of respondents of at least one or another age group or sex.

Differences By Sex

In general, male respondents seemed to differ more than did women from their non-aspiring counterparts, with respect to changes involving a reduction of work hours or workload. Women tended to differ more with respect to change for its own sake and especially with respect to change for the sake of better pay or opportunity. But a few of the needs and problems seem to characterize persons who have considered a change, irrespective of type of change. Relatively low perceived fulfillment of the need for a feeling of being useful is characteristic of males who have considered any change except one for increased opportunity or pay, and relatively high incidence of boredom distinguishes men who have considered all changes except a reduction in hours on their present job. Also, problems of strained relations with co-workers distinguish men who have considered change either just for the sake of change or for increased opportunity or pay.

Among women, strained relations with co-workers was a distinguishing characteristic of respondents interested in reduced workloads. But the characteristic most universal among female respondents who had considered job change was the feeling of lack of control, disproportionately mentioned by all aspiring job changers except those who had considered changing to part time in their present job.

Differences By Age

Also of interest were the differences among five-year age strata. Note, first of all, that viewed within five-year age strata, persons interested in reduced hours on their present job were statistically indistinguishable with respect to needs fulfillment or problems on the job.

As regards the four other types of changes in question 34, the group under age 41 tended to be fairly indistinctive in terms of needs fulfillment and job-related problems except that those who had considered change for its own sake differed significantly with respect to both needs and problems. Compared to others their age, respondents aged 41 through 46 who had recently considered a job change, were characterized by statistically high levels of problems, regardless of the type of job change considered.

It was among persons aged 46 through 50 that the statistical association varied most dramatically by type of change. Change to a new part-time job was characterized by relatively high levels of problems; change for improved pay or opportunity, by both high problems and low needs fulfillment; but change for less strain, by high levels of needs fulfillment.

Interest in Part-Time Work as Related to Planned Age of Retirement and Accrued Retirement Credit

Persons interested in part-time employment have been described in terms of their distinctive characteristics; they have also been identified as a group whose exclusion reveals a strong correlation between age and planned age of retirement among the residual response group. Are persons who have considered a change to part time characterized by distinctive plans with respect to planned age of retirement? If so, are these in any way associated with the age of the respondent?

In general, respondents favorably inclined toward part-time work are far more likely than others to plan retirement before age 65, and this earlier planned retirement is not characteristic of persons positively disposed toward sabbaticals or job rotation, the other components of question 32. Nor is it characteristic of persons who have considered changing jobs just for the sake of a change, and persons who have considered a change for the sake of better pay or opportunity actually are somewhat more likely than others to plan to retire at or after age 65. But the earlier planned retirement is characteristic also of persons who say that during the past year they have considered trying to change their schedules to part time or to look for a job that would enable them to work part time. Of 73 persons who had considered trying to get their jobs changed to part time, only 22 percent (16) planned to retire at age 65 or after, as against 42 percent of all respondents to the question. And only 23 percent (10) of the 43 who had considered changing jobs in order to get on a part-time schedule planned retirement at or after 65, as compared with 43 percent overall.

Moreover, persons with the dual attributes of planning early retirement and having considered changing to part time are in far disproportionate numbers over 50. Whereas that age group constitutes only 28 percent of the response group as a whole, they make up almost 43 percent of all persons both interested in part-time and planning early retirement.

The question then is: What reality lies at the root of the relationship between age of retirement and interest in part-time work? Are the (predominantly older) respondents who plan early retirement and are interested in part-time work persons who are fed up with work or worn out? Or do they hope to use the freed time to develop new skills to enable them to work in retirement? Or, are they simply anxious to develop new interests to be vigorously pursued in retirement? And what of the respondents who plan later retirement and are emphatically disinterested in working part time? Are they notably interested in their job? Or, are they especially needy financially and therefore dependent on earning a full-time income to as old an age as possible?

This section will examine within the context of their planned retirement age the group of respondents whose answers to questions 32, 33 and 34 reflect a positive attitude toward part-time schedules and/or interest in changing to a part-time or otherwise reduced work schedule. Characteristics to be examined will be demographics, work attitudes and satisfaction, career orientation and outside interests.

Years to Retirement

Since their exclusion resulted in a strong, previously non-existent direct correlation between age and planned age of retirement, respondents favorably disposed toward part-time work must have included a disproportionate number of young persons planning late retirement and/or older persons planning early retirement. In point of fact, well over one-third of all persons who had considered a change to part time in their present job were within ten years of their planned age of retirement (as compared to less than a fifth of respondents overall) and there was a highly significant statistical (inverse) ordinal relationship between having considered such a change and years left before retirement. There was not as consistent an ordinal relationship with respect to interest in changing to a new job to obtain a part-time schedule: whereas, of the group of respondents with this interest too, a far disproportionate 34 percent planned retirement in less than ten years, there was another disproportionately large group that had considered looking for a new job in which they could work part time and for whom retirement was a very distant prospect. However, with the exception of this last group, part-time employment held far the greatest appeal among respondents planning early retirement and within ten years of it.

Sex

If one analyzes responses of men and women separately, it appears the relationship between planned retirement age and having considered a change to part time in either the same position or a new one is statistically significant only among female respondents: chances are only 6 in 10,000 that two groups randomly drawn from the same population would differ with respect to planned age of retirement as do women who have and have not considered a change to part-time work. Of the 70 female respondents who had considered changing to part time during the past year or two and stated a retirement age, half planned to retire before age 62 and another 21 percent between 62 and 64 -- as compared with 37 percent and 17 percent respectively among all female respondents. Table 2 shows the proportion of all men and all women planning retirement at various ages who had considered changing to part time.

Table 2. Consideration of Change to Part Time As a Percentage of Men and Women Planning Retirement at Various Ages

Planned Retirement Age		Men	Women
	n=	24	70
Under 62	46	17.2	46.1
62-64	22	22.6	42.9
65-67	17	6.8	21.5
Over 67	9	13.6	22.2

Though male part-time enthusiasts also tended to some extent to plan relatively early retirement, their plans did not differ to a statistically significant extent from those of other male respondents. Because so much greater a proportion of men planned early retirement, those who had recently considered a change to part time in one of the two forms and planned early retirement constituted only 19 percent of those planning early retirement, (11 percent of men responding); for women the corresponding figure was 45 percent (25 percent of women responding).

Other Demographic Characteristics

Early- and late-retirement planners differed somewhat with respect to the characteristics that distinguished the two groups of respondents who had considered changing to part time. Among persons planning to retire before age 65,both groups that had considered a change to part time, i.e., in their own job or a new one, as well as those with a generally favorable inclination toward working part time (question 32) were statistically likely to have relatively little accrued retirement credit, be responsible for a relatively small part of the household income and have relatively high formal educational attainment. With respect to occupational classification, the 58 early-retirement planners who had considered a part-time schedule in their present job had by far the largest proportional representation among persons in professional positions--over half as compared to slightly under a third of respondents in administrative and secretarial/clerical positions. Of the 56 who marked the extreme value ("6") regarding whether they thought they might like to work part time (question 32), secretarial/clerical respondents were most overrepresented, professionals second. They were not significantly different from other early-retirement planners with respect to marital status.

Among persons who think they will retire at or after age 65, the pattern is somewhat different, especially as regards persons interested in cutting hours on their present job. To begin with, fewer than 13 percent of this group said they had considered having their present job made part time and fewer than 10 percent had considered a new job that would allow them to work part time--as compared to 28 percent and 20 percent respectively among the early-retirement planners. Much as the early-retirement planners, late-retirement planners interested in looking for a new job for a part-time schedule tended to have significantly less retirement credit, higher formal educational attainment and a lesser share of responsibility for their household income. However, none of these patterns was apparent from responses of persons who had considered cutting hours in their present job, whose principal distinguishing characteristic other than sex was marital status--they were disproportionately either widowed or divorced. The profile of the subgroup of late-retirement planners with a highly positive general attitude toward working part time more closely resembled that of persons who had considered cutting hours on their present job: other than female sex, there was only one significant correlate, in this case relatively high educational attainment.

Because of its strong correlation with interest in part-time work and its extremely strong correlation with planned age of retirement, accrued retirement credit warrants more detailed examination. Among the small group of late-retirement planners who had considered *making a job change in order to obtain a part-time schedule*, there were notably few with 5 or more years' credit and retirement credit was a significant (negative) correlate--as with persons planning early retirement. However, with respect to *general attitude toward working part time* as well as having considered *changing to part time in their present job*, late-retirement planners did not follow this pattern: whereas among persons planning to retire before age 65, a far disproportionate number of respondents who felt extremely negatively about working part time (values "0" or "1" on question 32, part 3) had at least 15 years of accrued retirement credit, among late-retirement planners, persons with very little accrued credit were equally likely to have very negative feelings about working part time. Thus, not only were late-retirement planners as a group far more unfavorably inclined toward part-time work, as a concept or in their present jobs, than respondents planning to retire before age 65; in addition, in marked contrast to the early-retirement planners, that unfavorable attitude was prevalent even among persons with very little accrued retirement credit.

In short, respondents planning early retirement were much more likely to have considered a change to part time if they had relatively small retirement-credit accruals, and respondents planning late retirement tended to be more interested in changing to a new part-time job if they had less than five years of retirement credit. But late-retirement planners tended to be negatively disposed toward reducing to part-time schedules in their own jobs irrespective of their retirement accruals.

Considering these two groups together, of the 26 late-retirement planners who had actually considered changing to a part-time schedule in either their present job or a new one, only one had over 14 years of accrued credit. In fact when responses were considered according to the dual attributes of early (or late) retirement plans and recent consideration (or not) of a part-time schedule and then these were tabulated against accrued retirement credit, the resulting distribution would have occurred less than one time in ten thousand, absent some significant relationship with accrued retirement credit. Overall, small retirement-credit accruals were statistically associated with having recently considered changing to part-time employment but only among persons planning early retirement.

Table 3. Consideration of Part Time Among Early- and Late-Retirement Planners as a Percentage of Persons Having Specified Retirement Accruals

Accrued Retirement (Years)	0-4	5-9	10-14	15-19	20-24	Over 24
n.	186	121	103	44	26	7
Plan Early Retirement						
Considered p.t. 68	14.0	14.9	13.6	15.9	7.7	14.3
Didn't consider 195	26.9	39.7	47.6	61.4	73.1	28.6
P.t. as % of no p.t.	52.0	37.5	28.6	25.9	10.5	50.0
Late Retirement						
Considered p.t. 26	6.5	5.0	6.8	-	-	14.3
Didn't consider 198	52.7	40.5	32.0	22.7	19.2	42.9
P.t. as% of no p.t.	12.2	12.3	21.2	-	-	33.3

Table 3 shows that among respondents planning early retirement, a fairly constant 14 percent of each retirement-accrual stratum planned early retirement and had considered changing to part time. But because persons with low accruals tended to plan late retirement, the part-time aspirants with low accruals constituted a much larger proportion of all early-retirement planners with similar accruals than did part-time aspirants with higher accruals. Respondents planning to retire at or after 65 tended to have significantly smaller retirement accruals and also less interest in working part time. But the proportion of late-retirement planners who had considered changing to part time tended, if anything, to be somewhat smaller among respondents with lesser retirement accruals, though not significantly so. Recall that among late-retirement planners, low retirement accruals characterize only the very small group interested in changing to a new job that would allow a part-time schedule. However, the later-retirement planners comprised disproportionate numbers of females, persons either widowed or divorced and with primary responsibility for household income--taken together, a good description of the displaced homemaker. Such later-retirement planners may not be interested in working part time because they give higher priority to building up low retirement accruals and want to work full time at least in part to maximize their entitlements,--and, no doubt largely also because they need a full-time salary.

In view of the disproportionate interest in part-time work among respondents within ten years of retirement, however, it may be that to at least some extent, proximity to retirement (rather than expectation of early retirement) is the significant factor. In that case, interest in part-time employment can be expected to increase among late-retirement planners as they come within 10 years of retirement. Because the sample in this study was drawn from a research population with an age limit of 55, it cannot offer any clues as to the inclinations of persons within 10 years of age 65.

Job Satisfaction and Career Orientation

Persons who have considered changing to part-time work were described earlier in this chapter in terms of the problems they said they encountered on the job and the perceived importance of their job in fulfilling a set of needs, as well as according to their career expectations. A breakdown of these perceptions by plans for early or late retirement characterizes these respondents within the specific context of how their part-time aspirations and longer-range intentions mesh.

For the most part it appears early or late planned retirement overrides interest in part-time arrangements as a distinguishing factor. Such characteristics as perceived lack of control, lack of follow-through on their work once it is out of their hands, and problems with co-workers, for example, are only slightly less characteristic of other early-retirement planners than they are of those who have considered changing to part time; they are notably less characteristic of persons planning late retirement, though emphatically least of all those who have not considered changing to part time. Nevertheless a few characteristics do specifically distinguish aspiring part-timers.

Both men and women interested in changing to part time were atypical of others of their sex planning early or late retirement. With respect to the perceived role of the job in meeting their needs, male early-retirement planners who had considered changing to part time did not exhibit the same extremely low ratings as did other men planning early retirement--nor the relatively high levels of problems encountered. Among women, it will be recalled, those planning early retirement were not characterized by significantly lower need-fulfillment by the job; those who had considered changing to part time did not differ from the others in this respect. But the part-time aspirants among women planning retirement at or after 65 were notable for the relatively low ratings a disproportionate number of them gave their job in meeting the various needs in question 4 and their relatively high ratings of problems. That is to say, with respect to the needs and problems listed in questions 4 and 5, the response distribution of female part-time aspirants planning late retirement most closely resembled that of males planning early retirement and not interested in part time. The response distribution of male part-time aspirants planning early retirement, on the other hand, more closely resembled that of men planning late retirement than of other men planning early retirement.

In addition, both early- and late-retirement planning part-time aspirants were significantly less attached to their jobs (question 17) than were other respondents, and both were also significantly more likely to be interested in changing to an entirely different type of work.

With respect to career orientation, respondents who had considered changing to part time and planned early retirement tended to say they were satisfied with their present level of responsibility (question 16) whereas those planning late retirement were more likely to want more responsibility -- but both groups were notably unlikely to anticipate increased responsibility. Especially unlikely to anticipate increased responsibility -- even compared to others who had considered changing to part time -- were the male part-time aspirants planning late retirement and even more markedly, the female part-time aspirants planning early retirement (see Table 4). It is interesting in contrast, that early-retirement-planning males who have considered changing to part time do tend to expect increased responsibility (as they tended also to have higher job-satisfaction levels than other men planning early retirement).

Table 4. Anticipation of Increased Responsibility as a Percentage of Early- and Late-Retirement Planners Who Have and Have Not Considered Changing to Part Time, by Sex

		Men	Women
	n=	190	271
Early-Retirement Planners			
Part time considered	63	52.9 (9)	26.1 (12)
Not considered	183	46.7 (42)	45.2 (42)
Late-Retirement Planners			
Part time considered	25	33.3 (2)	42.1 (8)
Not considered	190	51.9 (40)	50.4 (57)

Aspiring part-timers planning early retirement were additionally distinguished by the feeling that good performance on their part is rarely rewarded by improved relations with co-workers. The smaller group of part-time aspirants planning late retirement, however, was more distinct. Late-retirement-planning part-time aspirants were marked by disproportionate prevalence of extreme problems with boredom on the job, a distinction in which they only slightly surpassed persons planning early retirement and not interested in working part time. They were distinguished from the latter group however, in that they disproportionately characterized their job attitude (question 8) as bored, anxious or frustrated, whereas the early-retirement planners were more likely to describe themselves as anxious to get ahead.

Skill Development and Outside Interests as Motivation for Part Time

One hypothesis of the study was that an important reason for interest in part-time schedules might be to allow time to obtain training either for improvement of performance on the present job or to qualify for another.

Respondents were asked (question 19) likely reasons why they might fail to make a change to a job they would prefer, and one of the choices was inability to fit training into their schedule. Respondents marking this choice were in disproportionate numbers eager to change jobs as measured by questions 17 and 23. Among persons planning early retirement, they had also disproportionately considered changing to less demanding work. But there was no such statistical tendency among persons who had considered changing to part time in either their own job or a new one: persons interested in working part time were no more likely than others to have failed to make a job change because they were unable to schedule the training. Moreover, among persons planning early retirement, those who had recently considered changing to a part-time job were, if anything, less favorably disposed than others toward receiving additional training as measured by responses to question 26.

Only among late-retirement planners was consideration of a change to part time positively correlated with interest in job training -- very likely because these were the younger respondents. Among the 25 late-retirement planners who had recently considered a change to part time, a substantially disproportionate 55 percent were interested in receiving training to enable them to qualify for another job. The early-retirement planners who had considered a change to part time (under 13 percent of respondents overall), however, made up a disproportionate 17 percent of respondents who said they would not obtain training under any circumstances or only if it were required as a condition to keeping their job.

With respect to outside interests, the expectation was that consideration of a change to part time might be reflective of a desire to develop or pursue outside interests. As a measure of outside interests, the aggregate of items in question 46 was broken down into nine equal categories. Again the data failed to provide much corroboration of an association between outside interests and the job changes in question 34. High levels of outside interests were related principally to consideration of a change for better pay or increased opportunity, whether planning early-retirement or late-retirement. Late-retirement planners who had considered changing to a new job that would allow a part-time schedule did tend to have statistically higher outside-interest scores. But persons with by far the greatest representation in the highest outside-interest categories were those who planned to retire at or after age 65 and had not recently considered a change to part time. Thus the data lend only very limited support to the image of part time as a means for facilitating either self-development or pursuit of outside interests -- at least for this sample.

Summary

Contrary to most older respondents in this study, those interested in part-time arrangements tended to plan significantly earlier retirement than did younger respondents. Part-time arrangements tended to be sought by those male respondents whose needs were being relatively poorly met by their job, but this was actually less characteristic of men who had considered a change to part time than it was of other men planning early retirement. Women interested in changing to part time tended to have a relatively high incidence of job-related problems, notably those related to interpersonal relations. As was true with respect to early retirement, the importance of their job in meeting their needs was less of a factor among women than among men: women with a relatively high deficit of needs fulfillment by the job tended, rather, to consider changing to another full-time job, likely one seen as offering better opportunity.

Our data suggest that viewed in the context of their planned age of retirement, while there was also a statistically significant group under age 50, part-time employment was most likely to be favored by persons, especially women, over 50, and probably within ten years of their planned retirement age.

Those planning to retire before age 65 tend to be persons with secondary responsibility for household income, relatively high formal educational attainment and attendant unmet high career expectation -- who have relatively little accrued retirement credit, plan to retire early and see part-time work as a pleasant way of continuing to retirement. The concluding portion of chapter 2 contains reflections on some of the subjective factors common to interest in early retirement and part-time work.

Those planning late retirement are distinguished only by their sex and marital status, which fit the role of displaced homemaker. They tend to be relatively dissatisfied with their job. But respondents planning late retirement were unlikely to favor part-time employment, and those with low retirement-credit accruals were not more favorably inclined than others. However, the sample did not include late-retirement planners within ten years of their planned age of retirement and in view of the direct correlation between interest in working part time and proximity to retirement, it may be that interest in changing to part time will increase as these respondents draw closer to retirement. Our previous study on semi-retirement suggests the likelihood of such a change.

It was only among late-retirement planners that high levels of outside interests and a desire for job training were associated with having considered working part time. It may be that this statistical association reflects a long-range career perspective -- that these respondents hope to maintain to a more advanced age a mix of training and outside interests in combination with, and perhaps made possible by less time devoted to the job at any given period. In this sample, however, late-retirement planners interested in working part time were a very small group.

IV

THE WORKSHOP

Before the questionnaire design had been completed, preliminary work began on planning for a long-range career planning workshop. At this stage, the workshop was no more than an amorphous idea. There had been no decisions with respect to format or substance, or even number of sessions or participants.

The Advisory Panel

A list was compiled of all University of Washington officers heading departments concerned with the various phases of staff hiring, personnel development and retirement. Officers included were the director of the staff training office, the manager of staff employment, the director of physical plant, the personnel supervisor for hospitals, the retirement and insurance officer, two retirement counselors, a supervisor of personnel representatives, a gardner lead representing the union perspective and a gardner representing non-supervisory, mid-career employees.

The study plan called for involvement of these resource persons in two ways. First, they were to be interviewed by telephone for information within their respective domains relevant to the workshop design and to attempt to achieve a meeting of minds. Interviews were conducted with all the resource persons listed and most attended a planning colloquium or sent a representative. Each of them subsequently attended at least one of the workshops; when they were unable to attend, they sent substitutes in their stead.

Telephone Interviews and Colloquium

Though the telephone interviews with resource persons were unstructured, they focused explicitly on enlarging our understanding of the personnel, retirement and union procedures relevant to our prospective workshop and/or on recent related program offerings. Several of the interviews lasted over an hour (sometimes in two or three installments), but this was unquestionably time very well spent. The object was to design the workshop in such a way as would complement other programs available to the campus community and to ensure the awareness and support of persons responsible for those other programs. Persons interviewed were asked to send the study any available written material regarding their recent related activities.

Based upon these interviews, the colloquium was scheduled to plan the workshop. A copy of the colloquium agenda may be found in Appendix D. The colloquium was intended to resolve questions about which telephone interviews had produced conflicting views. Questions fell roughly into four categories: content; format; composition and scheduling.

In terms of content, there was general agreement that there should be some coverage of U W. procedures relating to promotion, transfer and other personnel actions. There was agreement also with respect to the need to introduce self assessment and values clarification. Clearly, too, it was important to include a component on job training opportunities. Finally, it was its focus on retirement benefits and later-year needs that was probably the feature most clearly distinguishing this workshop from many other career-planning seminars. Disagreement related not only to the degree of detail but also to the manner of presentation of each of these components.

The amount of detail was necessarily limited by the time available. Some consideration was given to breaking the workshop into two three-hour parts to allow inclusion of more material. This idea was rejected, however, as possibly detracting from the integrity of the workshop.

Considerable effort was invested in knitting information derived from the many perspectives into a coherent yet representative program. Following the colloquium, a series of memoranda were prepared outlining the intended focus and agenda of the workshop, and these were sent to the resource persons with a request for their comments. The first memorandum laid out the workshop in very broad terms; the second was somewhat more detailed and incorporated some of the comments and suggestions received in response to the first. The third was an actual agenda for the workshop and included a specific time when it was hoped the respective officials could be present, to be introduced and be available for questions.

Contacts to arrange for attendance of resource persons at the second and third workshops were made by phone with follow-up in writing. At this time, also, some of the resource persons who had attended the first or second workshop were interviewed to obtain their reactions.

Participants

Persons offered the opportunity to participate in the workshop were selected as described in Chapter I. To confirm a place in a workshop, persons in the sample were asked to fill out a preregistration form. This form also asked the registrants to indicate whether they would be willing to serve as a model for one of the career-assessment exercises. In addition, they were asked to list areas of particular interest or specific questions they wanted answered. A copy of the workshop preregistration is in Appendix D.

The questions listed as being of particular interest were grouped according to the resource person to whom they would best be addressed and forwarded to the resource persons before each workshop. More persons than could be used volunteered to serve as models. The selection was made with a view to providing a variety of backgrounds and outlooks, and persons selected were notified and advised by phone of the type of questions they could expect.

The Workshops: Evolution of Recommended Format

Because the basic components had been established in advance, experimentation centered on the question of the relative amounts of time to be accorded to each and the form in which they would be presented. The four basic components were: (1) an introduction to the basic types of circumstances underlying the need for long-range planning in the middle years (including considerations relating to retirement needs); (2) information concerning pensions and social security; (3) some systematic approaches to planning, including skills assessment, life-style preference, values clarification, exploration of the job market and; (4) an introduction to resource persons available within the organization (in this case the U.W. community).

At the first workshop the first two components were made the principal emphasis. U.W. resource persons were asked to be present only for the final half hour of formal program but to remain available during a one-hour brown bag lunch period immediately following. The single exception, a representative from the University employment office, was asked to come earlier and make a brief presentation concerning policies relating to advancement within the organization. (That topic had emerged as a principal concern from the preregistration questionnaire.)

The workshop leader eased participants into the workshop through an informally presented definition of the context: the circumstances creating a need for planning in mid-career using a flexible approach and a long-range orientation. With her own case as a point of departure, she was able both to lend credibility to the presentation and to establish a rapport with participants. The introduction was followed by a set of case studies -- some real, some hypothetical -- illustrating ways of using a long-range career-planning approach under a variety of circumstances to adapt a person's involvement in the workplace to his or her long-range needs. Following a brief break, the workshop leader gave a brief summary of the basic provisions of the Washington State Public Employees Retirement System (PERS) and Social Security, with emphasis on the way benefits are affected by length of employment and age of retirement. The personnel representative was then asked to make a presentation on opportunities and procedures for achieving transfers within the University system. This triggered extremely lively and even slightly belligerent discussion as participants vented their frustration in the face of what they perceived as shortcomings in the actual workings of the system.

In the final portion of the workshop, previously recruited volunteers were used to demonstrate, strictly by way of introduction, a superficial application of various instruments for self-assessment. These included procedures for self-exploration, decisionmaking based upon prioritized goals, crystal-ball gazing with a personal focus, and identification of gratifying accomplishments. Forms used in these exercises may be found in Appendix D.

At the end of the workshop, the various University resource persons were introduced and participants were encouraged to stay and talk to them. Participants had been advised on their preregistration forms that they could bring a brown-bag lunch in case they chose to stay and talk to resource persons.

This workshop was an extremely interesting one with a great deal of very animated interaction among participants. However, participants' evaluations suggested a deemphasis on invented case studies in favor of more time on applying recommended planning tools to live models. Also, it was apparent that the presence of the resource people was needed earlier in the workshop to respond to questions as they arose; very few participants stayed to talk after the conclusion of the formal workshop.

For the second workshop, therefore, case studies were eliminated, and there was a 30-minute break half way through the workshop to afford participants access to resource people. Resource people were asked to arrive just prior to the break and to seat themselves at tables with signs identifying their areas of expertise. Just before the break they were introduced by name and office only. After the break they were asked to sit as a panel at a speakers' table. They were asked to tell very briefly about their office and to respond to questions as they came up in the course of the live-model career-planning exercises that were the focus of the last hour of the workshop.

The second workshop was probably close to an optimal format. It appeared to have three minor flaws: (1) the brief introduction of resource people did not afford participants enough information as to the proper persons to seek out during the break; (2) there was still a feeling of mystification concerning hiring, transfer and promotion procedures; (3) there was an expressed need for an introduction that would set the tone of the workshop and let participants know what would be the format of the workshop -- in effect, to tune them in to the right wave length; and (4) too much time was taken by models thinking out values, ratings, and some of the other responses in the career-planning exercises -- some of which, it was felt, should have been done in advance.

Unfortunately the brief time (only 2 working days) between the last two workshops did not allow adequate time for making the recommended changes; as a result, the third workshop appeared somewhat less well organized than the first two. An agenda was presented, but it was not integrated into the opening remarks in such a way as to set the tone. Moreover, the resource persons became somewhat too much of a focus: the hiring/promotion procedure was explained in such detail that very little time remained for career planning exercises. Overall, while undoubtedly few questions remained unanswered concerning the U.W. system, this was at the expense of what should have been the primary emphasis, namely career planning.

Summary

The workshops were animated and provocative and enlightening with respect to both the perceived need for such an experience and a useful format for accommodating that perceived need. (The efficacy of such a format for achieving more prolonged workforce participation is, however, more dubious -- as discussed in the next chapter).

First, there is unquestionably a large felt need for such an exercise to serve persons in the 36 to 55 age group. Of 596 questionnaire respondents, 334 said they would be interested in attending a workshop on mid-career planning (fewer than half of these could be offered a place in a workshop and a number of calls of inquiry were received from persons not in the questionnaire sample).

Second, it appears the workshops did have the correct focus. The introductory statement of need for mid-life planning not only served an informational objective but also imparted a sense of legitimacy to participants' feelings. This was true with respect to interest in details concerning the retirement system and other retirement-related needs as well as to perceptions relating to more immediate needs, problems and aspirations. Finally, the opportunity for interaction with experts in various aspects of personnel policy was valuable, perhaps even essential. But it was probably a mistake to let resource persons' input take the form of presentations rather than response to specific questions. More complete background information should have been in the form of handouts outlining organization policy regarding: hiring, promotion and transfer (including the place of eligibility lists and seniority); procedures for achieving job redesign or reclassification; available training programs and policy regarding release time and the effect of training on eligibility for promotion; apprenticeship programs and other union policies as they affect opportunities in the trades; specific formulas relating to pension calculations; and types of positions for which there is a growing demand. These handouts could have been scanned during the break or perhaps before the start of the workshop. The role of the resource persons would then have become more clearly one of responding to questions not answered in the handouts, resulting both in a more interactive atmosphere and less use of valuable time. In the final analysis, however, addition of an extra hour would probably have added immeasurably to the value of the workshop.

The following recommended format represents an attempt to combine the best features of each of the three workshops, based upon participants' evaluations and our assessment after sitting in on the sessions and listening to tapes. The panel of resource persons is an integral part of this format, to be used interactively in the career-planning exercises. A small organization might not have staff with expertise in all the relevant areas; in that case, outside experts should be included to fill in any gaps. The importance of assembling a well-rounded panel cannot be overemphasized: it not only ensures availability of accurate information, and a comprehensive approach to questions as they arise, but also exposes each of the resource persons to all the others, as well as to this workshop, thereby potentially expanding the horizons of some of the resource persons. The upshot should be a better integrated program for human resource development. Moreover, including the experts in an interactive capacity offers an extremely stimulating format for both the dissemination of information and the career-exploration exercises.

Recommended Format for Retirement-oriented Career Planning Workshop Based upon Success of the Different Approaches Tried

I. Hand-outs: forms for exercises in self-assessment and planning (see Appendix D); specific information regarding hiring, transfer, promotion, training, job redesign and retirement as well as union policies and programs and areas of labor shortage.

II. Agenda: Outline of principal objectives and components of the workshop.

III. Rationale for mid-life planning

   A. Personal changes: changing psychic and/or financial needs
      changing experience
      changing view of prospects
      changing family obligations in both directions (increased responsibility for parents -- perhaps less for children)

      "displaced homemaker" status

   B. Technological change

IV. Introduction to techniques for skills assessment, values clarification, interests, statement of expectations, decision-making. Emphasize caveat that this is no more than an introduction: actual serious use of any of these devices is a very time- and energy-consuming undertaking.

V. Retirement plan provisions relevant to career planning.

Assemble Panel of Resource Persons: Reps of Available Career-related Services

VI. Introduction to career-development-related services within the organization, about 3 minutes per resource person.

VII. Break to mingle w/representatives of those services and ask questions

VIII. Exercises in planning, using as models participants who have been previously familiarized with the procedure so as to save time during the workshop and actively involving the panel of resource people to respond to questions in their respective areas as they come up. (Subjects likely to come up include: job redesign; reclassification; procedures for advancement, lateral transfer, hire to an entirely different classification, importance of training for improving eligibility; computation of retirement service credit and eligibility criteria, Social Security eligibility criteria; types of jobs most widely available; apprenticeship programs).

The foregoing format was the result of a process of trial and error. Components were discarded when it appeared they contravened the intended focus of the workshop, took an excessive amount of time, or failed to command the attention of workshop participants. Judgments based upon these criteria happened also to coincide with participants' written evaluations (see evaluation form, Appendix D).

V.

IMPACT OF WORKSHOP AND QUESTIONNAIRE

The organization of the study as a whole was described in Chapter I. This section will describe the design that formed the basis for assessing the effectiveness of the workshop and the extent to which the questionnaire itself had the effect of an intervention. The subsequent description of experimental groups will aim both to expose sources of bias and to explore the characteristics that statistically distinguish persons interested in attending a "mid-career planning" workshop. The remainder of the chapter will present the results of the analysis.

Design

Data for evaluating the effectiveness of the questionnaire and workshop were derived in two ways, both resting heavily upon telephone interviews. First, several of the interview questions asked the interviewees to evaluate changes over the prior two months -- questions 1 and 2, for example (see Appendix B); these were subject to the limitations of the interviewee's identifying perhaps subtle changes and placing them in the correct time frame, but had the advantage that information was self-contained and available for all interviewees. Second, responses on the interview were compared with those on the questionnaire when this was possible; this had the advantage of greater objectivity, but the disadvantages that the questions were not asked in identical form (though very nearly so) and, more important, that for one-quarter of interviewees there were no questionnaire data because these interviewees were intended as a control on the effects of the questionnaire. Descriptive data for which the questionnaire was the source were of course also unavailable for respondents in the group that had not received a questionnaire. Thus the inability to categorize this group with respect, for example, to their marital status (or any of the other attributes derived from responses on the final page of the questionnaire) further limited their comparability.

Persons to be interviewed were randomly drawn from four groups stratified by age; however, within each five-year age block in each group there was a ceiling of two persons per occupational classification. Group 1 consisted of persons who had attended the workshop; group 2, persons who were interested in attending (based upon the final question on the questionnaire) but did not -- either because they were not given the opportunity or because they were unable to; group 3, persons who were not interested in attending; and group 4, persons who had not received the questionnaire or any other prior contact from our study. Sample size for each group was 32, with the expectation of 30 completed interviews in each group; actual completions were 32, 32, 30 and 27 in groups 1, 2, 3 and 4 respectively.

Group 2 served as the most comparable control for effectiveness of the workshop, sharing as they did the interest in attending. Group 4 was intended as a control for gauging effectiveness of the questionnaire on those questions for which information was derived solely from the interview: since group 4 had not received a questionnaire, pre/post comparisons were not possible as already stated, nor were analyses by certain of the demographic characteristics, available only from the questionnaire.

Differences Produced by Sampling Procedure

Appendix C contains the distribution of interviewees by group with respect to their demographic characteristics. Analysis of the demographics of interviewees showed they were indeed virtually perfectly matched, overall, with the questionnaire sample in terms of age and sex. Within the interview sample, however, there were some slight differences among groups with respect to sex and occupational classification. There were slightly more females among workshop participants (group 1) and other questionnaire respondents interested in attending (group 2) than among respondents not interested in attending (group 3) or among persons who had not received a questionnaire. The other factor thought most likely to introduce spurious effects was occupation: here again the groups were notably similar, with the single exception that secretarial/clerical personnel were slightly underrepresented among workshop attenders, reflecting the sampling ceiling of two persons from any given occupational classification in any given age cohort.

Differences Related to Interest in Attending the Workshop

The groups differed more notably, however, with respect to several other characteristics that were not taken into consideration in the sampling process. These differences, it seems, reflected differences in the populations sampled; that is, they reflected certain characteristics that statistically distinguished persons interested in attending the workshop from those not interested in attending. Questionnaire respondent populations from which the samples to be interviewed were drawn will be referred to as (Roman) groups I, II and III, respectively to distinguish them from the smaller interviewee groups 1, 2 and 3.

It is interesting that groups 3 and 4 contained notably more part-timers than did the two groups of interested respondents; it would appear that part-timers are less interested in career planning -- at least in a formal setting. Moreover, group 3 contained significantly more married respondents and group 1 a disproportionate number of divorced and unmarried persons, reflecting a generally stronger career orientation among persons who are not married. Again it must remain a matter of speculation whether financial need or self-development and a dependence on work to meet personal needs was the impelling force; however, in view of the statistically significant tendency of married persons to rate their jobs higher than others in terms of aggregate needs fulfillment, it would appear that the greater career orientation of unmarried respondents is primarily motivated by financial consideraations. With respect to educational attainment, the interview sample distribution overall resembled the profile of questionnaire respondents, the modal level being some college, business or vocational school beyond high school. This profile also characterized groups 1 and 2, but the group not interested in attending was characterized by a larger proportion of persons with at least a college degree (because this was information derived from the questionnaire, there are no data available for group 4). It appears the workshop did not hold the same appeal for persons who had graduated college as it did for those with somewhat lower levels of formal educational attainment.

Workshop participants were distinguished by several characteristics pertaining specifically to work orientation. Questionnaire respondents interested in attending the workshop tended to have significantly lower scores than other respondents on aggregated needs met (question 4) and very significantly higher scores on aggregated problems (question 5). Actual participants differed significantly from other respondents only in their greater problems. However, among persons in the interview sample, group 1 included over half of the nineteen whose aggregated ratings of needs fulfillment were in the top third.

The characteristic that most emphatically distinguished participants was the preponderance among them of interest in changing jobs for the sake of better pay or opportunity (question 34e). Moreover, this extremely disproportionate interest in improving their position maintained irrespective of whether or not they planned to retire by age 65. In addition, workshop participants were also more likely than other respondents to say (question 16) that they would like to do more responsible work but didn't think they'd have a chance to.

The disproportionate expression of interest in upward mobility was held in equal measure by interviewees in group 2, and the significantly lower frequencies for persons in group 3 are especially interesting in view of the fact that the three groups of questionnaire recipients (groups 1, 2 and 3) had equal number of persons anticipating increased responsibility. Respondents in groups I and II were also far more likely than other questionnaire respondents to say they would change jobs if they thought there were more opportunities for persons in their 30s, 40s, or 50s (question 23), and this interest was the greatest of all among persons who actually attended the workshop.

As compared with the overall group of questionnaire respondents, the 75 workshop participants also contained a highly disproportionate number of those who thought they would like to work part time (question 32, part 3) and retire after age 64. However, apparently this group was underrepresented in the interview sample -- probably because they included a fair number of secretarial/clerical, the classification deliberately undersampled (see page 13). There was another group of persons planning to retire before age 65 who had considered changing to a less-demanding job and were disproportionately represented among respondents interested in attending the workshop, but again these must have been undersampled in the selection of interviewees. Thus in these two respects, the decision somewhat to equalize representation of occupational classifications resulted in an interview sample that failed to reflect the characteristics of the larger group I and group II populations from which it was drawn, but an interview sample in which the study groups were made more comparable.

Thus a profile of the distinctive characteristics of workshop participants emerges. Perhaps most notable was the large group of participants who were anxious -- and significantly more so than other interviewees -- to change jobs if this would improve their opportunities or pay. Along with their greater career orientation, persons interested in attending the workshop as well as those who actually attended had relatively less of an outside-interest orientation (aggregate of question 46). Again it is a matter of speculation whether the career orientation represents compensation for a deficit in outside interests, or the outside interests a substitute for satisfying involvement in the workplace, or both.

Male respondents who attended the workshop (group I) tended in highly significant degree to plan later retirement than other male questionnaire respondents (all but four planned to retire at or after age 65), but there was no such distinction among women. Among interviewees, those not interested in attending were more likely to plan to work after retirement only if they were forced to financially; the financial aspects of retirement concerned them relatively more than such aspects as what they would do after they retired -- perhaps because they tended to have somewhat longer to go until their retirement than did interviewees in groups 1 and 2 and included especially few persons within five years of their planned age of retirement.

The fact that in so many respects workshop participants and others interested in attending differed to a statistically significant degree from other questionnaire respondents and/or from other interviewees raises a question as to whether those distinctions relate in any way to the study interventions. The workshop was not held until later and thus not a factor; and persons merely interested in attending were no less distinct a group than those who actually attended. The question then is whether a "yes" response to question 53 of the questionnaire (concerning interest in attending a mid-career planning workshop) possibly reflected something more than the desire to attend a workshop. Taken at face value, "no" respondents might simply tend toward more of an individualistic, as distinguished from group or establishment, orientation -- or perhaps a lesser desire for exposure to new or different experiences. As already discussed, there is some evidence, too, that interest in attending betokens more of a work or career orientation. But it is possible that to some extent, the "yes" response reflected a greater assimilation of the thought progression incorporated in the questionnaire and therefore a greater commitment in filling out the questionnaire. To the extent that this is the case, group 3 might serve as a backup control on groups 1 and 2, which would presumably have benefitted more fully from the experience of completing the questionnaire. Thus it could serve as another control, a surrogate for group 4, in those cases -- involving change from questionnaire to interview, or other data derived from the questionnaire responses -- where group 4 is unavailable because no questionnaire data are available. Any interpretations resulting from use of group 3 as a surrogate for group 4 must, however, be viewed with considerable skepticism -- simply as offering one more perspective to the analysis.

The Interview

One hazard of an interactive instrument is that different nuances be attached to the questions at different times. Worse still, when dealing with subject matter potentially unfamiliar to some interviewees, it is often tempting to the interviewer to be "helpful" and thereby bias the response. Interviews in this study were conducted by only two persons and subject to the understanding that no information was to flow from the interviewer until the conclusion of the interview as such -- even where the result was a "don't know" response.

It should be noted here, however, that frequently significant discussion did take place at the conclusion of the interview -- discussion that filled a real information need. Were the interviews to be repeated in identical form, information levels would likely be markedly higher, especially on those questions dealing with tax effects and some of the less well-known provisions governing social security and the state pension plan.

No attempt was made by the interviewers to hurry interviewees along, however. Many interviewees began during the interview to think out some of the details and considerations relevant to work before and after retirement.

To the extent that their responses did reflect those thoughts, they were not strictly reflective of the status quo before the interview, but these were nevertheless entirely the interviewees' own thoughts. The effect of the instrument in somewhat altering what it seeks to assess is well known and not peculiar to surveys, and was in fact the basis of our hypothesis that the questionnaire would operate as an intervention, QED.

Findings

The telephone interview was designed in part as a self-contained instrument to explore horizontal differences among different treatment groups and to assess change over the two- or three-month period following completion of the questionnaire and attendance at the workshop. Focusing on the various career-related topics around which the interview was built, this section will first look at the relative frequencies of responses on the interview. Next responses will be examined for any significant differences between the different treatment groups, i.e., between the group of interviewees who attended the workshop (group 1), the group that expressed interest in attending but did not attend (group 2), the group that said they were not interested in attending (group 3), and the group of non-questionnaire-recipients (group 4). Finally, in those cases where comparable data were generated by the questionnaire and interview, a portion of each subsection will compare interview and questionnaire responses. These analyses of differences over time will focus on changes in planned age of retirement, interest in reducing workload or work hours, plans for work involvement after retirement and thought given to when to retire and what to do after retirement.

Training

Over three-fifths of the interviewees had not taken any job training or other kinds of classes (question 1) during the two months following the workshop and preceding the interview. Among persons not interested in attending the workshop, however, the proportion was significantly greater: over seven-eighths had not taken classes -- a showing consistent with their lesser career orientation. Of the interviewees interested in attending, almost half had signed up for some kind of class during the two months before the interview, and this was equally true of workshop participants and interested non-participants. The two interviewees who said they had taken classes on career planning had both attended our workshop and it may be to that that they were referring.

Job Change

Fewer than half of all interviewees had not thought about a job change of some sort (interview question 2), and the principal reason given for having considered change was having reached a plateau, i.e., exhausted opportunity for advancement in the present job. As expected from questionnaire responses, persons interested in attending the workshop (groups 1 and 2) were significantly more likely to have considered a change, though non-participants to an even greater extent than participants. Over two-fifths of all persons who said they had not considered a job change were respondents not interested in attending the workshop, and almost three-fourths of this group had not considered a change.

Causes of the contemplated job change varied significantly by group. Consistent with their strong career orientation, persons who had attended the workshop tended to be disproportionately concerned with having reached a plateau in their career and accounted for almost half of all responses in this vein. Questionnaire respondents who had expressed interest in but not attended the workshop, were more likely to be seeking greater satisfaction or relief from pressure. In contrast, persons who had not received a questionnaire were likely to have based their consideration of a job change simply on dissatisfaction with their present job. This lesser specificity cannot be overlooked in interpreting the impact of the questionnaire. Presumably, completion of the questionnaire was at least associated with some refinement and definition of thoughts about job and career-path satisfaction. One can of course make the case that questionnaire completion represented a self-selecting process favoring persons more inclined toward career planning. But there was an equivalent number of interview refusals from non-questionnaire recipients -- witness the final decision to be content with an "n" of 27 in that group rather than the target of 30. Thus it is likely that the questionnaire was at least in part a factor in the difference.

A variable was computed to represent consideration given to any one of the job changes in question 34 of the questionnaire and this was compared with consideration of job change as reflected by question 2 of the interview. In view of the workshop emphasis on values clarification and exploring different options, it was expected that workshop participants would have had the highest rate of increase in consideration of a job change from questionnaire to interview; this turned out not to be the case. Once again the only significant difference was between groups 1 and 2 on the one hand and group 3 on the other: the group not interested in attending the workshop showed proportionately little increased interest in job change during the two months following completion of the questionnaire. That is to say, not only did group 3 interviewees tend to be less interested in any kind of job change to begin with, but that interest did not pick up even proportionately following completion of the questionnaire. It is likely that the differences in group profiles (see page 76) were at least a factor. However, it is entirely possible also that group 3 interviewees -- perhaps in part because of their different profile -- treated the questionnaire more casually and superficially and failed to assimilate the thought progression it incorporated.

Reduction in Work Involvement

Only slightly over half of the interviewees had no interest in reducing their work involvement in any way at some time before retirement: about 8 percent mentioned less-demanding work, one-fourth thought they might be interested in reduced hours, and another twelve percent said they were already working part time. (The four study groups differed significantly in relative numbers of part-timers; half of all part-timers interviewed had said they were not interested in attending the workshop, and all interviewees who actually attended were working full time.) The group that thought they might like to work reduced hours was disproportionately aged under 46, representing 34 percent of all persons under 41 and 31 percent of persons 41 through 45.

Persons who had attended the workshop tended to be less likely than others to think they might want to change to less demanding duties or to a less-than-full-time schedule at some time before retirement. In this respect they differed significantly from persons in group 2 as well as from the entire interview sample. However, since they had similarly differed from group 2 on the questionnaire, this difference is at least in large part attributable to the make-up of group 1 and cannot be interpreted as an effect of the workshop.

Among all three groups that had received a questionnaire, essentially the same people who had expressed interest in part-time work on the questionnaire also said on the interview that they might be interested in changing to less demanding work or a less-than-full-time schedule at some time before retirement. All told, there was a statistically greater increase in interest among interviewees not interested in attending the workshop, and in addition to having the least interest to begin with, participants exhibited the smallest increase of all. These changes bore no statistical relationship to any of the attitudinal variables such as needs fulfillment, problems on the job or general job enthusiasm. Workshop attendance itself was apparently the key. One principal thrust of the workshop was to develop an awareness of the availability, acceptability and potential benefits of alternative work schedules; these data emphatically suggest it failed to achieve this objective.

On the other hand, persons who had not received a questionnaire also tended to be notably disinterested in changing to less demanding duties or to a less-than-full-time schedule: only 7 of them thought they might be interested in reduced hours and 4 in less-demanding duties, so that almost 60 percent of that group had no interest in either option. Assuming the proportion of persons with strong interest in improved job opportunities was no greater in group 4 than in the questionnaire sample, it is noteworthy that their interest in reduced hours or less-demanding duties was significantly lower than that of interviewees in the aggregate of the other three groups. It would appear that the questionnaire itself did contribute toward increased awareness of reduced work involvement as a realistic option.

Retirement Planning

Over two-thirds of the interviewees had given some thought to retirement during the previous two months. The four study groups differed significantly in this regard: interviewees who had attended the workshop were more likely to have thought about retirement at some time, especially during the two months preceding the interview, as compared to either interested non-participants or the interview sample as a whole (well over three-quarters of workshop participants said that during that period they had thought about retirement, as compared with less than two-thirds of the other interviewees). There was no significant difference among the other three groups, so it appears the questionnaire was not effective in raising this concern but the workshop was. In particular, among persons in group 2, high levels of outside interests were statistically related to not thinking about retirement, but workshop participants had thought about retirement irrespective of their outside interests.

The groups differed statistically, also, with respect to the aspect of retirement about which they had been thinking (interview question 5b). The principal concern overall was with the adequacy of financial resources, mentioned by almost half of all respondents. But interviewees who had said they were not interested in attending the workshop were in disproportionate numbers (five-eighths of this group as compared to about two-fifths in the other groups) concerned about the adequacy of their pension and their financial resources generally. The two groups interested in attending the workshops (groups 1 and 2), on the other hand, tended to be disproportionately concerned with the relative merits of their pension entitlements as a form of investment.

Recall that persons in groups 1 and 2 tended to have significantly less time remaining before their planned age of retirement than did people in group 3, but nevertheless significantly less accrued retirement credit. Under these circumstances, changing to a job outside the Public Employees Retirement System (PERS) did not entail as much of a sacrifice in potential retirement income, and the consideration of alternative investment applications for the employee portion of contributions makes sense --independent of workshop attendance. Thus the difference in focus of retirement thoughts. Consistent with this, recall too that a person in group 1 or 2 was much more likely to have recently considered a job change than one in group 3. In fact groups I and II (the population from which groups 1 and 2 of the interview sample were drawn) were not only much more likely to be interested in changing jobs but also to be interested in changing to a different type of work. Moreover, the difference was such as would occur by chance less than one time in ten thousand in a uniform population. But none of these differences can be attributed to the workshop and most of them probably antedate the questionnaire as well.

Only twelve interviewees volunteered that they had been thinking about how to use their skills and in general what to do in retirement. However, when asked specifically whether they had given any thought to what they would do after retirement, over two-thirds answered in the affirmative. Workshop participants did not differ from non-participants in this respect. However, the group not interested in attending the workshop differed significantly from the other three: almost two-thirds of the not-interested group said they had not given any thought to what to do in retirement. Moreover, persons in the not-interested group were significantly less likely to have increased their thoughts of what to do in retirement as measured by difference in response between the questionnaire and the interview. Probably their greater distance from retirement was a factor here -- very likely in combination with a (perhaps consequent) lesser interest in the questionnaire.

The two-thirds of interviewees who said they had given some thought to when to retire were fairly evenly distributed over the four groups -- as also were the approximately five-eighths of respondents who said they had thought about the adequacy of present involvements as preparation for retirement. There was a very strong statistical relationship between increased thought of when to retire and low levels of outside involvements and an equally strong tendency for increases in planned age of retirement to be related to low outside involvements, but this was not at all true among workshop participants. And among both groups of interviewees interested in attending the workshop (groups 1 and 2), increased thought about when to retire was related to a negative job attitude. Though 55 percent of workshop participants (group 1) felt that the age at which they planned to retire was fairly firm (interview question 6a) as compared to 47 percent for interviewees as a whole, this difference was not statistically significant.

Work After Retirement

Only 20 of the 121 interviewees said they planned not to work after retirement or would do so only if absolutely forced to by financial pressures. These were disproportionately under 46 years old, the same bracket also most interested in reduced work involvement before retirement. But though older interviewees were more likely to plan to do some work after retirement, this was not true of those who expected to have less than 19 years' accrued retirement credit when they retired. As discussed in what follows, a lower age of planned retirement appears to be the missing link.

Far the principal reason given for continuing to work was to keep active or meaningfully involved, mentioned by over half (52%) of the interviewees. Very few thought they would work full time or nearly so; part-time work in excess of half time and less than half time each commanded slightly over one-third of responses. Fewer than three out of ten of those who said they would work thought their work would be totally unrelated to their present work or current interests; well over a third said it definitely would be related -- generally interviewees in skilled crafts, security, administrative or paraprofessional technical positions. Fourteen percent mentioned consulting or some other type of private business or cottage industry. Over a third of interviewees were not looking forward to their retirement, but almost half were.

Workshop participants were significantly more likely to expect their work after retirement would not be related to current work or interests. Given its emphasis on values clarification and exploration of options, it is likely the workshop was an important factor in this difference of expectations. In other respects, changes in plans for working after retirement were not related to workshop attendance or interest in attending.

However, the entire group of persons interested in attending (including actual participants) were much more likely, as compared to those not interested in attending, to plan work involvement in excess of half time after retirement -- perhaps again indicative of their stronger career orientation -- whereas respondents not interested in attending disproportionately planned not to work after retirement.

Interviewees' plans for work after retirement were fairly consistent with work plans reflected by their questionnaires. However, somewhat over one-third planned less retirement-work involvement than they previously had and these were fairly evenly distributed across the three groups that had received a questionnaire. Interviewees whose retirement-work plans had been revised upward tended to be the ones who had revised their planned age of retirement upward; almost two-thirds of interviewees whose planned age of retirement remained constant were also consistent with respect to planned retirement work, and this group represented one-fourth of all interviewees. However it was only among persons interested in attending the workshop (groups 1 and 2) that there was a statistically significant direct correlation between change in planned age of retirement and change in work planned for retirement.

Needs fulfillment by the job was not significantly related to changes in retirement-work plans. However, among interviewees interested in attending the workshop (including those who actually attended) those with the lowest levels of problems on the job (question 5) were significantly overrepresented among persons who had revised their retirement-work plans downward from their questionnaire responses, a counter-intuitive finding.

Work plans were not related to having signed up for classes in general during the two months preceding the interview. However, oddly, interviewees who had signed up for some kind of career-related training during the months before the interview were much more likely than others to plan to work less than half time after retirement: some work but short of half time was planned by 50 percent of the 22 interviewees who had obtained training but only 29 percent of those who had not.

Among workshop participants, those with the highest level of outside interests (aggregate of questionnaire question 46) were the ones most likely to have revised their retirement-work plans downward during the months following the workshop. There was no such tendency among interviewees in either of the two other groups that had received a questionnaire. Four of the 12 workshop participants who had reduced their plans for work after retirement, had outside involvements in the top 20 percent as compared to only 1 of the 9 others who would have liked to attend and 2 of 13 not interested in attending. This suggests that perhaps the values clarification exercises of the workshop influenced participants to think about retirement within the context of overall demands upon their time. To the extent that this is an accurate interpretation, it attests to the effectiveness of the workshop in accomplishing at least a part of its objectives.

Of all the statutes, regulations and rules relating to retirement, only the social security earnings test was regarded by interviewees as associated with work planned in retirement. Workshop attendance did not appear to relate to interviewees' feelings that the social security earning test would affect their plans regarding whether and how much to work after retirement. However, persons interested in attending (including the participants) were significantly more likely to expect the earnings test to be a factor and persons who had not received a questionnaire significantly less likely -- suggesting the difference may well have been associated with the questionnaire.

Planned Age of Retirement

Because a principal objective of the study was to develop interventions that would result in prolonged workforce participation, responses to question 6 (planned age of retirement) of the telephone interview were of primary interest, particularly as they related to planned age of retirement on the questionnaire. The crucial question was whether there was any statistically significant difference between the subgroups of interviewees with respect to changes in the age at which they planned to retire and, in particular, whether any such differences could be related to either workshop attendance or to the questionnaire itself. Also of interest were any other changes in response from questionnaire to interview that related to changes in planned age of retirement; these, it was thought, might offer additional insights into ways to prolong workforce participation.

As may be seen from the tabulations entered on the telephone interview form (Appendix B), the mean planned age of retirement among all interviewees was 61.66 years. This was somewhat lower than the mean planned age of retirement among all questionnaire respondents (63.14), but the median age among interviewees was slightly higher (63.5 as compared with 62.41 for questionnaire respondents).

The four study groups did not differ significantly with respect to planned age of retirement. Probably more revealing were the missing data:

Table 5. Factors related to changes in planned age of retirement.

```
* * * * * * * * * *  A N A L Y S I S   O F   V A R I A N C E  * * * * * * * * * *
                   RETAGDIF CHANGE IN PLANND RETMENT AGE
                BY GROUPI02 ALL RECEIVED ORE
                   CHGRWRK  CHANGE IN WORK PLANNED FOR RETIREMENT
                   WKREDCH  CHANGE IN INTEREST IN REDUCING WORK INVOLVEMENT
                   TIMTHTCH CHANGE IN THOUGHT OF WHEN RET
                   DOTHTCH  CHANGE IN THOUGHT OF WHAT TO DO IN RETIREMENT
* * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * * *

                                   SUM OF                 MEAN               SIGNIF
SOURCE OF VARIATION               SQUARES       DF      SQUARE         F      OF F

                                 3215.868        8     401.983     4.298     .002
MAIN EFFECTS                      299.222        2     149.611     1.600     .219
   GROUPI02                       309.898        2     154.949     1.657     .208
   CHGRWRK                        916.908        2     458.454     4.902     .016
   WKREDCH                        776.049        1     776.049     8.297     .007
   TIMTHTCH                        18.343        1      18.343      .196     .661
   DOTHTCH

                                 5506.244       10     550.624     5.887     .001
2-WAY INTERACTIONS                240.824        2     120.412     1.287     .291
   GROUPI02 CHGRWRK              1806.949        3     602.316     6.440     .002
   GROUPI02 WKREDCH              2415.269        2    1207.634    12.912     .001
   GROUPI02 TIMTHTCH              105.235        1     105.235     1.125     .297
   CHGRWRK  WKREDCH              2230.632        1    2230.632    23.850     .001
   CHGRWRK  TIMTHTCH               13.376        1      13.376      .143     .708
   WKREDCH  TIMTHTCH

                                   40.833        1      40.833      .437     .514
3-WAY INTERACTIONS                 40.833        1      40.833      .437     .514
   GROUPI02 CHGRWRK  WKREDCH

                                 8762.945       19     461.208     4.931     .001
EXPLAINED
                                 2805.875       30      93.529
RESIDUAL
                                11568.820       49     236.098
TOTAL


     121 CASES WERE PROCESSED.
      71 CASES ( 58.7 PCT) WERE MISSING.


DUE TO EMPTY CELLS OR A SINGULAR MATRIX,
HIGHER ORDER INTERACTIONS HAVE BEEN SUPPRESSED.
```

7 of the 27 (26%) respondents who had not received a questionnaire would not venture a specific age; this compared to 3 of the 30 (10%) in group 3, and 5 (16%) and 4 (13%) of the 32 in groups 1 and 2. Clearly the questionnaire respondents had given this more thought than had the control group of interviewees who had not received a questionnaire.

As might be expected, there was an extremely high correlation between planned age of retirement entered on the questionnaire and that in the telephone interview, and this was true irrespective of age and sex. Yet when responses of male and female respondents were analyzed in detail, it turned out that fewer than half in either category had actually responded precisely the same way on the two occasions. But it was the direction of the change that was particularly interesting: whereas 10 of the men had revised their plans downward and only 4 upward, among women 13 had shifted downward and 17 upward and another 4 who on the questionnaire had said "don't know" now had a plan. That is to say, not only were the proportions quite different, but men tended to have shifted downward and women upward. Since a larger proportion of female questionnaire respondents had attended the workshop, it was thought the greater prevalence of postponed-retirement plans among women might be related to workshop attendance. However, there was no statistically significant difference between participants and interested non-participants, nor even between interviewees interested in participating and those not interested.

Revisions in planned age of retirement were not significantly related to levels of needs fulfillment or problems on the job or of outside involvements; nor were they related to attitude toward the job or career expectation.

An ordinal association between planned age of retirement and planned work after retirement among group 1 interviewees has already been mentioned (page 91). Changes in planned age of retirement were analyzed to determine the importance of changes in retirement-work plans and in plans for reduced work involvement, as well as several other factors in explaining the variance in the change in planned age of retirement from questionnaire to interview.

The analysis of variance (ANOVA) showed that a change in the amount of thought given to when to retire (questionnaire #41 and interview #5b) and changes in interest in obtaining a reduced workload or schedule (part time)(questionnaire #34 and interview #3) were significant factors in explaining the variance in the planned-age-of-retirement differences (questionnaire #42 and interview #6). Additionally, several two-way interactions were highly significant factors: interaction between study group and changed interest in reduced work involvement; interaction between group and change in amount of thought given to when to retire; and interaction between change in amount of work planned for retirement (questionnaire #45 and interview #8) and thought given to when to retire. As compared to the other two groups that had received a questionnaire, mean increase in planned age of retirement from questionnaire to interview was greater among those respondents who had attended the workshop and had increased their thinking about when to retire or decided against changing to shorter hours or less demanding work. Table 5 presents a summary of the ANOVA. Though in each case the number of workshop participants with changed responses was small, the ANOVA suggests that the changes in planned age of retirement were not random but to a considerable degree explained by changes in other related factors, all of which had been included as part of the study interventions. That is, reduction in work involvement and work to be pursued in retirement are appropriate focuses for a workshop or other effort that seeks to alter target retirement ages.

With respect to statutory influences on their decision as to when to retire, over two-fifths of respondents thought the eligibility age for full social security benefits would be no more than a slight influence and well over half thought the early-retirement eligibility age would be inconsequential. There was almost an even split between interviewees who thought they would and would not be influenced by the social security earnings test, and the same distribution characterized the expected influence of the number of hours of work permitted, short of forfeiting receipt of pension benefits. As was true with respect to plans for working after official retirement, persons interested in attending the workshop (groups 1 and 2) were much more likely than other interviewees to expect the earnings test to be an important influence on their decision as to when to retire. Interviewees interested in attending the workshop, and in particular those who actually participated, tended to accord more importance also to the PERS limitation on hours worked than did other interviewees. All in all, groups 1 and 2 exhibited greater familiarity with retirement regulations -- a familiarity perhaps, again, related to careful completion of the questionnaire.

Evaluation by Interviewees

Only 29 interviewees completed and returned the evaluation sheets distributed at the end of each workshop. All but five answered an unqualified "yes" to the question asking if they would recommend the workshop to their best friend; the other five said it would depend upon the needs of the friend, generally explaining that degree of interest in undertaking change would be the crucial factor.

The component judged most helpful by far the largest number of people was the values-clarification segment and related handouts. Also mentioned by at least five people each were the panel of departmental representatives and questions they fielded and information regarding retirement provisions -- though one person expressed surprise at inclusion of the latter. It was apparent at all three workshops that participants were not only quite uninformed regarding the retirement system but also very much interested in learning about it.

Implications of Findings

This workshop was the product of a painstaking planning process involving three draft plans. Those drafts were preceded by and interspersed with commentary from an advisory committee of 15 persons including representatives from every related department within the campus community, including at least two experienced at conducting career-related seminars. The workshop leader, a personable woman, herself had conducted numerous career-related workshops. The setting was a comfortable one, the discussion generally lively. Participants' evaluations were overwhelmingly favorable. The paucity of statistically significant differences between responses of group 1 and the other 3 groups of interviewees is therefore puzzling.

Though group 1 did differ in important respects from groups 3 and 4, it was quite comparable to group 2. Why, then, did interview responses largely fail to reflect the workshop exposure -- especially with respect to planned age of retirement, consideration of job change or interest in alternative work patterns. Far from reflecting acceptance of the notion of reduced work involvement as a way of enabling the worker to continue working to an older age, postponement of planned retirement tended instead to have been related among workshop participants to abandonment of previous thoughts of changing to part-time or less-demanding work. How can this be explained?

The workshop component on provisions of the Washington Public Employees Retirement System provides one clue. The workshop provided a fairly detailed explanation of the formula on which pension entitlements are based: a reduced salary in the last years before retirement results in the pension's being computed on a (two- or five-year) base pay that does not reflect cost-of-living increases of those final years -- an increasingly important factor. A workshop participant keenly conscious of inflationary trends may well have been persuaded that it was in his/her interest both to postpone retirement and to discard thoughts of reduced work involvement. Quite likely, also, the three-month interval before the telephone interview was not enough time for the ideas to be fully assimilated. The workshop was intended as an appetizer, not as a thorough exercise in any of its components, but perhaps a follow-up is needed in order to entrench the long-range perspective. Another interview at the end of a year or two would unquestionably be valuable both to enhance our understanding and as a reminder to participants.

Summary

Though on the whole, groups 1 and 2 together tended to differ more often from the remaining interviewees than from each other, group 1, the workshop participants alone, did differ in a number of important respects. First, a highly significantly greater number of them said they had thought about retirement, especially during the months after the workshop. Second, they were the only group in which high levels of non-job-related involvements tended to be associated with decreases in planned retirement work. Third, they were less likely to expect their retirement work to be related to current work or interests. All of these differences may well be interpreted as relating to the workshop emphasis on values clarification and exploration of options from a long-range perspective.

Group 4, the group that had not been exposed to either questionnaire or workshop also differed significantly in several respects. Perhaps most notable was the very much greater proportion of group 4 interviewees who would not (could not?) come up with an age at which they planned to retire. Secondly, group 4 contained significantly fewer interviewees who thought they might be interested in changing to less-demanding duties or a less-than-full-time schedule at some time before retirement. Third, they were much less likely to expect various social security and pension provisions to constrain their decision as to whether and how much to work in retirement. Finally, group 4 interviewees tended to be notably less specific than the other interviewees in their reasons for having considered a job change, generally simply citing dissatisfaction. All of these factors had been encountered by group 1, 2 and 3 interviewees in the questionnaire; from the statistically different interview responses of group 4 interviewees, it would appear that those questions had stimulated further thought or at least not been forgotten.

Statistical analysis suggests that reduction in work involvement before retirement and in work to be pursued in retirement are appropriate focuses for a workshop or other effort that seeks to alter target retirement age. Failure of the workshop participants to show more widespread receptivity to the alternative-work-pattern component of the workshop may have been due in part to information provided regarding computation of entitlements under the state retirement system, but in part also to the profile of the group.

Viewed with the benefit of hindsight, it was in fact an important flaw in this study that there was no effort to ensure representation of a broad cross-section of career orientations. As a result, workshop participants included too many persons with strong career aspirations but little expectation of realizing those aspirations. Greater diversity of career perceptions would have provided a more meaningful test of the validity of the workshop. Inasmuch as there was an excess of volunteers, it should have been possible to better balance the workshop profiles with respect to perceived career outlook.

Another shortcoming of the study was the brief time allowed for the ideas contained in the questionnaire and workshop to take hold. When the issue at hand is in effect a long-range plan, three months is scarcely enough time for an idea to germinate, let alone to take root. A follow-up survey should be conducted in a year or two to assess more long-term effects.

APPENDIX A:

Questionnaire and Responses

University of Washington
Institute of Governmental Research

LONG-RANGE CAREER PLANNING

Many of these questions are in the form of a seven-part scale. In each case, please check the box that seems closest to the way you feel. It may help to consider the seven boxes as steps leading from the left end to the right end. We think you will find this helps you to pinpoint how you feel about different aspects of your job and its place in your life. At the same time, your use of the scale will help us to understand your answers and combine them with other people's. Try to avoid using the middle box -- you'll usually find you lean at least somewhat in one direction or the other.

/THE FIRST GROUP OF QUESTIONS HAS TO DO WITH THE PLACE OF YOUR JOB IN YOUR LIFE/

1. Different people expect different things from their jobs. How do you feel about your job as a meaningful way to spend your time? Is it

Not at all meaningful			Moderately important			Extremely important	
12 (20%)	27 (4.5%)	36 (6.1%)	38 (6.4%)	134 (22.6)	189 (31.8)	158 (26.6%)	1
0	1	2	3	4	5	6	

2. How do your job and your activities away from the job compare in terms of providing you with what you consider a meaningful way to spend your time?

Leisure activities are far more meaningful			They are equally meaningful			Job is far more meaningful	
42 (7.1)	61 (10.3)	104 (17.5)	156 (26.3)	151 (25.4)	47 (7.9)	33 (5.6)	2
0	1	2	3	4	5	6	

3. How do you feel about the amount of time you have to do things away from the job?

Not nearly enough			Just about right			Far too much spare time	
140 (23.5)	132 (22.2)	173 (29.1)	98 (16.5)	33 (5.6)	13 (2.2)	5 (.8)	3
0	1	2	3	4	5	6	

4. How important is your job in meeting each of the following needs? (Please check the appropriate column to the right of each item from "a" to "g")

	Not at all			Moderately			Extremely important	
a. Social needs — being part of a work community; contacts with people	(5.9%)	(6.4%)	(8.6%)	(15.6%)	(22.0)	(23.6)	(17.8)	4
b. Personal growth — knowledge, understanding, abilities	(4.7)	(4.9)	(6.6)	(10.0)	(22.7)	(24.7)	(26.3)	5
c. Status - a place in the working world	(7.0)	(8.4)	(8.7)	(13.0)	(23.2)	(23.7)	(16.0)	6
d. Feeling of being useful	(2.9)	(6.4)	(5.3)	(7.5)	(20.7)	(28.6)	(28.6)	7
e. Recognition or esteem	(8.2)	(7.9)	(10.4)	(13.4)	(19.9)	(22.9)	(17.3)	8
f. Outlet for creativity	(11.7)	(9.1)	(10.5)	(12.7)	(18.6)	(21.9)	(15.5)	9
g. A regular way to occupy my time	(15.1)	(9.5)	(13.2)	(14.0)	(20.5)	(14.4)	(13.3)	10
	0	1	2	3	4	5	6	

See also aggregates, page 118.

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5. Following are problems people sometimes encounter at work. To the right of each, please check the column that tells how much of a problem that is for you.

	Not at all			Somewhat of a problem			Quite a bit of a problem	n
h. Boredom; lack of challenge	(30.7%)	(22.1%)	(15.2%)	(11.6%)	9.9%)	(3.9%)	(6.4%)	11 584
i. Feeling that the work is useless	(50.2)	(23.5)	(10.2)	(6.5)	(5.8)	(1.9)	(1.9)	12 586
j. Lack of recognition	(27.1)	(20.4)	(15.6)	12.5)	(7.4)	8.2)	(8.6)	13 582
k. No chance to show initiative - feeling of suffocation	(36.3)	(21.5)	(12.0)	(8.6)	(8.0)	(6.1)	(7.5)	14 573
l. Feeling of lack of control	(28.9)	(22.0)	(14.9)	(11.4)	(10.9)	(6.2)	(5.5)	15 577
m. Strained relations with co-workers	(52.9)	(24.7)	(9.2)	(6.3)	(2.7)	(1.9)	(2.2)	16 586
n. Strained relations with supervisor	(55.7)	(18.7)	(8.0)	(6.1)	(2.9)	(3.1)	(5.5)	17 587
o. Need for more feedback	(26.4)	(23.3)	(13.6)	(11.8)	(10.6)	(6.8)	(7.5)	18 475
	0	1	2	3	4	5	6	

See also aggregates, page 118.

6. In general, do you feel that the work you do accomplishes what you wanted after it leaves your hands?

No hardly ever			Yes, usually			Yes, almost all the time	
5 (.9)	11 (1.9)	28 (4.8)	85 (14.6)	98 (16.8)	161 (27.7)	194 (33.3)	19
0	1	2	3	4	5	6	

7. Good performance can have a variety of favorable results. In your present job, how often have you experienced any of the following as a result of good performance?

	Never			Sometimes			Very often	n
Promotion or pay increase	(39.9%)	(11.7%)	(7.9%)	(14.2%)	(15.0%)	(7.3%)	(4.0%)	20 572
Good feeling about having done a good job	(1.0)	(1.7)	(4.1)	(7.3)	(18.4)	(33.8)	(33.6)	21 586
Better relations with supervisor	(6.7)	(6.2)	(7.7)	(15.8)	(20.8)	(24.4)	(18.2)	22 581
Better relations with co-worker(s)	(4.0)	(4.9)	(6.3)	(18.4)	(21.0)	(25.7)	(19.5)	23 575
Other (describe) See tabulation, page 113.								24 76
	0	1	2	3	4	5	6	

8. Which of the following best describes your attitude toward your job? Check only the one best description.

Enthusiastic	[ ] 25-1	192	(33.0%)
Eager to get ahead	[ ] 25-2	128	(22.0)
It's not a bad way to make a living	[ ] 25-3	162	(27.9)
Anxious	[ ] 25-4	17	(2.9)
Frustrated	[ ] 25-5	56	(9.6)
Bored	[ ] 25-6	24	(4.1)
Anxious, frustrated + bored		1	(2.2)
Stoic, dedicated		1	(2.2)

9. Thinking about changes that have been made or could be made in the way your work is done, please indicate your feelings about the best way to do that work.

It was far better the way we used to do it			One way is about as good as another			People keep finding better ways to do it	
14 (2.5)	13 (2.3)	21 (3.8)	43 (7.7)	119 (21.4)	187 (33.6)	160 (28.7)	26
0	1	2	3	4	5	6	

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/THIS GROUP OF QUESTIONS HAS TO DO WITH CHANGES IN YOUR FEELINGS ABOUT YOUR JOB/

10. If you had known at that time what your preferences and needs are now, do you think you would have taken your present job?

No 27-1 29(5.4%)
Probably Not 27-2 51(9.5)
Probably 27-3 135(24.8)
Yes 27-4 322(60.1) → Skip to Q. 12

11. What would you have done differently?

See tabulation, page 113. 23

12. In terms of challenge and interest, how do you feel about your job now as compared to shortly after you began working there?

Much less interesting now			About the same			Much more interestering now	
41(7.2)	27(4.7)	41(7.2)	92(16.1)	112(19.6)	133(23.3)	126(22.0)	29
0	1	2	3	4	5	6	

13. How would you describe your motivation and enthusiasm on the job over the years?

Much less now			About the same			How much now	
32(5.5)	36(6.2)	61(10.5)	117(20.1)	155(26.7)	130(22.4)	50(8.6)	30
0	1	2	3	4	5	6	

14. Why do you think there has been that change?

Additional Item Mentioned

No change			3 (.6)
Due to being in one job for a long time	[ ]	31-1	86 (18.1)∞
Due to management or supervisor	[ ]	31-2	102 (21.5)*
Due to getting older or more mature	[ ]	31-3	61 (12.8)□
More challenge or increased responsibility	[ ]	31-4	175 (36.8)◊
Other (Please describe) Job changed	[ ]	31-5	10 (2.1)
*◊Management + Challenge			21 (4.4)
∞◊Tenure + Challenge			9 (1.9)
*□Management + Older			6 (1.3)
∞□◊Tenure, Older + Challenge			2 (.4)

15. Where do you see yourself in terms of development in your position?

Have barely started			Have good understanding but am still growing			Have reached limit of growth	
6(1.0)	12(2.0)	32(5.5)	149(25.4)	166(28.3)	123(21.0)	99(16.9)	32
0	1	2	3	4	5	6	

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/THIS GROUP OF QUESTIONS HAS TO DO WITH YOUR WORK PLANS FOR THE FUTURE/

16. Which of the following **best** describes where you are in your working life?

I expect to have a chance to do more responsible work	[ ] 33-1	262 (45.3)
I would like to do more responsible work, but I don't think I'll have a chance to	[ ] 33-2	146 (25.3)
I am satisfied with the level of responsibility I have now	[ ] 33-3	140 (24.2)
My work is too demanding. I would prefer an easier workload or shorter hours	[ ] 33-4	10 (1.7)
Other (Please describe) In transition to more meaningful work	[ ] 33-	15 (2.6)
Switch to managerial		1 (.2)
Quick step classification; close to retirement		2 (.4)

17. How attached are you to your present job?

I don't want to change — I might consider changing jobs — I'm anxious to change

0	1	2	3	4	5	6	
84 (14.4)	83 (14.3)	84 (14.4)	104 (17.9)	109 (18.7)	64 (11.0)	54 (9.3)	34

18. Please indicate the job path you'd most like to follow.

Continue in same kind of work — Get somewhat different work — Change to an entirely different type of job

0	1	2	3	4	5	6	
145 (25.1)	110 (19.1)	81 (14.0)	59 (10.2)	81 (14.0)	31 (5.4)	70 (12.1)	35

19. What are the principal reason(s) you might not try to change to the kind of job you'd prefer? (If more than 1, please indicate "1" for principal reason, "2" for second. Do not check more than 2.)

			"1"	"2"
I like it where I am	[ ]	36,7-1	266 (49.7)	39 (13.8)
I don't want to have to start all over again	[ ]	36,7-2	63 (11.8)	51 (18.1)
I don't want to have to take additional training	[ ]	36,7-3	2 (.4)	4 (1.4)
I can't work the training into my schedule	[ ]	36,7-4	24 (4.5)	14 (5.0)
I don't know where to get the right kind of training	[ ]	36,7-5	18 (3.4)	20 (7.1)
I can't afford to pay for the training I'd need	[ ]	36,7-6	30 (5.6)	20 (7.1)
It's too hard for a person my age to get a job in a new line	[ ]	36,7-7	58 (10.8)	53 (18.8)
I don't want to give up the retirement credit I've earned	[ ]	36,7-8	74 (13.9)	81 (28.7)

20. Is there any job or type of job for which you think you are better qualified now than you were 10 years ago?

No [ ] 38-1 159 (33.3) Yes [ ] 38-2 319 (66.7)

Please explain See tabulation, page 114. 39

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21. If you were to try to get another job for which you feel qualified, how would your chances of getting it compare to an equally qualified older person's chances?

I wouldn't stand a chance — Age wouldn't make a difference — I'd have a much better chance

0	1	2	3	4	5	6	
12 (2.1)	6 (1.1)	24 (4.2)	226 (39.6)	138 (24.2)	100 (17.5)	64 (11.2)	40

22. If you were to try to get another job for which you feel qualifed, how would your chances of getting it compare to an equally qualified younger person's chances?

I wouldn't stand a chance — Age wouldn't make a difference — I'd have a much better chance

0	1	2	3	4	5	6	
48 (8.3)	60 (10.4)	150 (26.0)	161 (27.9)	81 (14.0)	40 (6.9)	37 (6.4)	41

23. If you thought there were plenty of opportunities for people to start on new job paths in their later thirties, forties or fifties, how interested would you be in starting in a new direction?

Not at all — Somewhat — Extremely

0	1	2	3	4	5	6	
55 (9.4)	44 (7.5)	44 (7.5)	83 (14.2)	118 (20.2)	102 (17.4)	139 (23.8)	42

24. Do you actually think there are plenty of such opportunities?

No [ ] 43-1 221 (38.1) Not sure [ ] 43-2 202 (34.8) Yes [ ] 49-3 157 (27.1)

25. How suitable was your education and/or training as preparation for jobs you have wanted?

				Additional Item Mentioned
Job and training unrelated			1 (.2)	
Altogether the wrong emphasis	[ ]	44-1	44 (7.8) *	+ 3
Too specific to allow flexibility	[ ]	44-2	28 (5.0)	+ 2
Too general to provide needed proficiency	[ ]	44-3	69 (12.2) ◊	
Not enough of it, but the emphasis was all right	[ ]	44-4	121 (21.5)	+ 8
More than I really needed to do the work	[ ]	44-5	69 (12.2) □	+ 2
More than I needed to do the work, but it was a requirement for the job	[ ]	44-6	28 (5.0)	+ 2
Just about right	[ ]	44-7	198 (35.1)	+ 1
*◊ Wrong emphasis and too general			4 (.7)	
◊□ Too general and too much			2 (.4)	

/THIS GROUP OF QUESTIONS HAS TO DO WITH YOUR INTEREST IN RECEIVING FURTHER TRAINING/

26. What is your present attitude toward obtaining additional training?

Second item marked

I would not take any further training	☐ 45-1	27 (4.7)	—
I would take further training only if it was required for my job	☐ 45-2	37 (6.5)	+ 2
I would like to receive training to improve my performance	☐ 45-3	136 (23.7)	+ 4
I would like to receive training to make me eligible for a higher-level job	☐ 45-4	175 (30.5)	+ 1
I would like to receive training if I thought it would help me get a higher level job, but I don't think it would	☐ 45-5	43 (7.5)	+ 7
I would like to receive training to make me eligible for a different job	☐ 45-6	71 (12.4)	+ 11
I would like to receive training if I thought it would help me get a different job, but I don't think it would	☐ 45-7	16 (2.8)	+ 4
I would take training for better performance or a different job		26 (4.5)	
I would take training for better performance or a promotion		42 (7.3)	

27. Would you be more likely to obtain training if the training program was adapted to the needs and background of mature workers?

No ☐ 46-1 51 (9.1)   Probably not ☐ 46-2 101 (18.0)   Probably ☐ 46-3 252 (44.8)   Yes ☐ 46-4 158 (28.1)

28. Have you enrolled in any educational or training program in the last 5 years?

No, neither	☐ → Skip to Q. 30	47-1	152 (26.3)
Yes, but not related to my job	☐ → Skip to Q. 30	47-2	75 (13.0)
Yes, educational	☐	47-3	102 (17.6)
Yes, training	☐	47-4	83 (14.4)
Yes, both	☐	47-5	165 (28.5)

29. Did you obtain a different job as a result?

No ☐ 48-1 294 (73.9)   Yes ☐ 48-2 49 (12.3)   Possibly or partly ☐ 48-3 54 (13.6)

30. Do you think the training and/or education will prove useful to you as you grow older?

No ☐ 49-1 28 (5.9)   Probably not ☐ 49-2 77 (16.2)   Probably ☐ 49-3 174 (36.6)   Yes ☐ 49-4 196 (41.3)

31. When, if ever, do you think you may want to go back to school?

While I'm working full time	☐	50	247
While I'm working part time	☐	51	79
I'll take time off from work to study	☐	52	33
Between jobs	☐	53	28
After retirement	☐	54	150

/THIS GROUP OF QUESTIONS HAS TO DO WITH DIFFERENT WAYS OF ORGANIZING WORK/

32. To the right of each of the following, please indicate your attitude toward the idea.

	Would not like			Neutral			Would like very much	
Job rotation (having a chance to switch jobs with people doing other jobs in your organization)	174 (30.7)	43 (7.6)	22 (3.9)	77 (13.6)	68 (12.0)	66 (11.6)	116 (20.5)	55
Sabbaticals (occasional opportunity to take several months off to explore other things -- with partial pay)	75 (13.5)	22 (4.0)	16 (2.9)	55 (9.9)	47 (8.5)	72 (12.9	269 (48.4)	56
Part-time employment (working fewer hours per week so as to have time for other things or to rest -- with salary reduced proportionately)	209 (38.6)	46 (8.5)	22 (4.1)	41 (7.6)	65 (12.0)	53 (9.8)	105 (19.4)	57
	0	1	2	3	4	5	6	

33. Which of the following statements comes closest to the way you feel about part-time work? (By part-time work we mean regular permanent employment on a schedule of fewer hours than a full-time work week. For each hour of work the pay would be the same as for each hour of full-time work in the same classification). Please check only the one you agree with most.

1. Part-time jobs cause a lot of confusion and extra work [ ] 58-1 49 (8.7
2. Persons who work part time are not as committed to their jobs as those who work full time [ ] 58-2 94
3. A part-time job allows time and energy for training or to develop interests or contacts outside the job or to attend to other demands [ ] 58-3 369 5.
4. A part-time job makes it easier to bear the stresses and strains of the job [ ] 58-4 43 (7.

Allows energy + easier to bear strains 5 .9
Allows energy but part-timers are less committed to job 4 (.7
Easier to bear strain but less committed 1 (.2

34. During the last year or two, have you ever considered any of the following: (Please circle No or Yes)

a. Changing to a part-time schedule in your present job	336	No 59-1	103	Yes 59-2
b. Transferring to a less demanding job	374	No 60-1	56	Yes 60-2
c. Transferring to a job that would allow a part time schedule	350	No 61-1	69	Yes 61-2
d. Transferring to a different job for the sake of a change	280	No 62-1	164	Yes 62-2
e. Transferring to a different job for the sake of better pay or better opportunity	151	No 63-1	381	Yes 63-2

35. If you answered 'Yes' to any of the above, did you make the change?

No 64-1 367(82.4) Yes 64-2 78(1

36. Why not? See tabulation, page 114. 65,66

THIS GROUP OF QUESTIONS HAS TO DO WITH PLANNING AHEAD

37. Some people think a great deal about their future; others prefer to let nature take its course. How would you describe yourself as a goalsetter and planner?

I don't believe in planning ahead at all			I do a moderate amount of planning			I plan everything carefully	
3(.5)	22(3.8)	50(8.6)	130(22.3)	192(32.9)	127(21.7)	60(10.3)	67
0	1	2	3	4	5	6	

38. Do you expect your job will suit your needs as you approach 60 years of age? (Please circle one)

No 68-1 109(20.6) Probably not 68-2 95(17.9) Probably 68-3 139(26.3) Yes 68-4 186(35.2) → Skip to Q. 41

39. In what way

It will be too strenuous physically	[ ]	69-1	34(14.3)
It will be too strenuous mentally	[ ]	69-2	16(6.7)
It will require skills I don't have	[ ]	69-3	9(3.8)
It would be too long to spend at one job	[ ]	69-4	51(21.4)
It will not offer enough of a challenge	[ ]	69-5	105(44.1)
Too long and insufficient challenge			18(7.6)
Physical and mental strain			4(1.7)
Inadequate income			1(.4)

40. Do you plan to do anything about it? (Please check one)

Obtain training to help with my job	[ ]	70-1	20(8.4)
Obtain training for a different job	[ ]	70-2	86(36.4)
Seek to have the job redesigned to suit my changing needs and abilities	[ ]	70-3	33(14.1)
Reduce my work schedule	[ ]	70-4	16(6.7)
Change to a different job that doesn't require further training	[ ]	70-5	40(17.0)
Make the best of the job as it is	[ ]	70-6	41(17.4)

41. Have you thought at all about your retirement?

	Not at all			A moderate amount			A great deal	
How much have you thought above when you'll retire?	57(10.2)	69(12.3)	75(13.4)	101(18.0)	93(16.6)	78(13.9)	87(15.5)	71
How much have you thought about what you'll do after you retire?	47(7.9)	63(11.3)	82(14.7)	91(16.4)	102(18.3)	82(14.7)	89(16.0)	72
How much have you thought about how you'll support yourself after you retire?	29(5.2)	45(8.1)	65(11.7)	86(15.5)	85(15.3)	116(20.9)	130(23.4)	73
	0	1	2	3	4	5	6	

42. At about what age do you plan to retire? Mean: 63.14 74,75 $\frac{1}{76}$ $\overline{77}$ $\overline{78}$ $\overline{79}$ $\overline{80}$
See also frequency distribution, page 117.
Median: 62.41
Mode: 65 Note: "Never" was coded & counted as 99. There were 8 of these. 1,2

43. Why at that age? See tabulation, page 115.

44. Do you know how many years of retirement credits from the University you now have?

No [ ] 318(57.0) Yes [ ] 240(43.0) → How many? Mean: 11.55 Median: 10.42 Mode: 5
However, compare actual 3,4 MEAN: 7.45 MEDIAN: 6.08 MODE: 2

45. Do you think you will probably work at all after your retire? (Check only the one most likely)

No 47(8.62) [ ] 5-1
Yes, volunteer work 80(14.0)+6 [ ] 5-2
Yes, occasional jobs 89(16.0)+4 [ ] 5-3
Yes, part time 152(26.7)+2 [ ] 5-4

Yes, volunteer and part time 6(1.1)
Yes, full time [ ] 19(3.3)
Yes, in my own business or profession [ ] 91(16.0)+1
Yes, on a free-lance basis [ ] 76(13.3)+2
Yes, don't know what 9(1.6)

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/PLEASE ANSWER THIS GROUP OF QUESTIONS TO HELP US INTERPRET THE RESULTS OF THE STUDY/

46. Next to each category below, please check the column that tells how important that role is as part of your present life.

	n	Does not apply to me at all 0	1	2	3	4	5	Extremely important 6	
Artists, craftsman, dancer, singer, potter, etc.	545	(28.6%)	(11.9%)	(7.4%)	(10.1%)	(11.0%)	(13.2%)	(17.8%)	6
Churchgoer	556	(37.9)	(14.4)	(8.3)	(7.4)	(6.5)	(7.7)	(17	7
Club member	537	(46.6)	(18.6)	(12.7)	(8.2)	(7.3)	(3.5)	(3.	8
Employee or professional	542	(7.7)	(3.5)	(5.7)	(10.5)	(14.9)	(26.4)	(31.0)	9
Arts supporter; music, movie, museum or drama goer	542	(12.4)	(13.7)	(13.7)	(14.8)	(16.2)	(15.8)	(13.	0
Community activist	536	(35.3)	(24.8)	(14.2)	(8.8)	(7.3)	(4.9)	(4.9	1
Parent or grandparent	557	(18.3)	(1.6)	(3.2)	(5.4)	(9.0)	(14.0)	(48.5)	2
Son, daughter, son-in-law or daughter-in-law	535	(18.1)	(8.6)	(6.5)	(9.3)	(11.0)	(13.5)	(32.9	3
Husband or wife	546	(25.1)	(1.3)	(1.5)	(3.1)	(5.7)	(12.1)	(51.3	4
Reader	562	(2.3)	(4.8)	(9.1)	(12.1)	(16.9)	(22.2)	(32.6)	15
Gardener	558	(14.3)	(14.7)	(9.9)	(16.1)	(15.4)	(12.5)	(17.0)	16
Sports participant or outdoor person	552	(12.1)	(12.9)	(10.0)	(12.5)	(15.0)	(18.3)	(18.3	7
Sports enthusiast-spectator	548	(27.4)	(18.1)	(10.9)	(11.5)	(12.6)	(12.0)	(7.5	8
TV viewer or radio listener	566	(7.2)	(19.3)	(20.5)	(17.3)	(15.2)	(10.8)	(9.7)	15
Volunteer worker	536	(31.0)	(19.6)	(16.0)	(9.9)	(10.3)	(7.3)	(6.0)	0
Other (Specify) See tabulation, page 115.									

See also aggregates, page 118.

47. How many years have you held your present position? Mean: 6.26 Median: 4.68 Mode: 2.00 22,23

48. Do you supervise two or more people? No [ ] 24-1 316 (55.5) Yes [ ] 24-2 253 (44.5)

49. What is your marital status?

Married [ ] 380 (65.7) 25-1 Unmarried [ ] 62 (10.7) 25-2 Divorced [ ] 114 (19.7) 25-3 Widowed [ ] 23 (4.0) 25-4

50. What contribution does your salary make to your household income?

I provide the total income	[ ] 26-1	202 (35.1)
I provide most of the total family income	[ ] 26-2	134 (23.1)
I provide about half the total family income	[ ] 26-3	119 (20.6)
I provide less than half the total family income	[ ] 26-4	123 (21.2)

51. What is the last grade of school you completed?

11th or lower	[ ] 27-1 19 (3.4)		Bachelors Degree	[ ] 27-4 144 (25.5)
12th	[ ] 27-2 44 (7.8)		Advanced Degree	[ ] 27-5 108 (19.12)
Some college, business or vocational school	[ ] 27-3 250 (44.2)		Other (specify) See tabulation, page 116.	[ ] 28

52. Please check the category that describes your total household income before taxes.

Under $6,000	[ ] 29-1 8 (1.5)	10,000 - 14,999	[ ] 29-3 92 (16.7)	20,000 - 29,999	137 (24.9)
6,000 - 9,999	[ ] 29-2 26 (4.7)	15,000 - 19,999	[ ] 29-4 89 (16.2)	30,000 or over	197 (35.2)

53. We plan to offer a workshop on mid-career planning in about a month. Do you think you might be interested in attending?

No [ ] 219 (39.6) 30-1 Yes [ ] 30-2 334 (60.4) -Please indicate phone number and a good time for us to reach you)

THANK YOU! Please return one copy of this questionnaire and one copy of the consent form via Campus Mail to Career Study, Institute of Governmental Research, JM-10. Use the same envelope if you like, but cross out your name.

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Other Favorable Results from Good Performance
(Question 7)

Gratitude of a client or student; customer satisfaction; prestige as a consultant	17	(22.4%)
Increase in workload	3	(3.9)
Sense of having earned my pay; satisfaction; self esteem	7	(9.2)
Criticism; lack of cooperation	9	(11.8)
Increased responsibility	14	(18.4)
Job is becoming easier	15	(19.7)
Personal education	2	(2.6)
Get to work at home	1	(.2)
None	8	(10.5)

Likely Preferred Job Decision
(Question 11)

Difference in detail, e.g. changed route or schedule	2	(2.4)
Selected or inquired about supervisor, work setting or division	7	(8.4)
More thorough job search; inquiry about position or workmanship	4	(4.8)
Taken non-supervisory position; pay differential not worth it, less strain	3	(3.6)
Stayed in old position or continued to work out of the union hall	9	(10.8)
More education; finished high school; obtained Ph.D.; applied for loan to go to school full time	13	(15.7)
Waited for a position for which better qualified; switched for better pay; pushed for reclassification	14	(16.9)
More challenging job; opportunity to grow; more creative; fulfilling	18	(21.7)
A field with better opportunity or incentive; private industry; own business	13	(15.7)

Jobs for Which Better Qualified Now Than Ten Years Ago
(Question 20)

			Add't'l Item Listed
Skills (including ability at public contact); present job; organizing	112	(36.1%)	+6
Knowledge of work situation; varied experience; work attitude; sales; increased general knowledge and confidence; familiarity with ways and language of the job	48	(15.5)	+4
More responsibility; managerial position in same field	103	(33.2)	+2
Teaching; full professorship	8	(2.6)	+4
Life and education; wisdom and experience; learning and growing; maturity; self-understanding	26	(8.4)	+2
Skills and management	6	(1.9)	+2
Different interest; creativity	2	(.6)	
Owning own business; consulting independently	5	(1.6)	

Reason for Not Making the Job Change
(Question 36)

			Add't'l Item Listed
Not qualified; didn't get the job; not qualified according to personnel department; not sent on interviews; system makes transfer to a different classification impossible; little information on opportunities; too time-consuming in this system	124	(35.6)	+8
No chance for part time; no replacement available	3	(.9)	+1
Scarce type of job; no opportunities available; limited opportunities for minorities and women	34	(9.8)	+2
Not sufficiently better than present job; too much travel; no growth potential	35	(10.1)	+8
Like present job; good opportunities; job has improved; more responsibility now	41	(11.8)	+8
Good pay in present job; benefits; seniority	20	(5.7)	+7
Supervisor won't allow present job to be part time; can't get other part-time or part-year job	21	(6.0)	+2
Can't afford lower pay; reluctant to start at bottom of pay scale	34	(9.8)	+8
Part-time job would pay less per hour	1	(.3)	+1
Inertia; didn't want to go on interview or fill out form; need time to think about it; haven't been long enough in present job	35	(10.1)	+7

Reasons for Planned Age of Retirement
(Question 43)

			Add't'l Item Listed
It's the mandatory age	15	(3.7%)	
Tired; bored; will have slowed down, be unproductive by then; will want more time at home; have earned it	35	(8.7)	+3
Social security eligibility	31	(7.7)	+2
Need to work as long as can; money; inflation; to stay active; for stimulation; to use talent	73	(18.1)	
Pension eligibility; 20 years (or 25 or 30) working for the U.W.	83	(20.6)	+8
Will be able to afford it by then (kids grown, house paid, earliest possible time I can get retirement)	19	(4.7)	+2
Time for other things; early enough to develop a new life style; to have health to travel or otherwise enjoy retirement; to get another job; retire to a small farm	98	(24.3)	+13
Minimum age for pension benefits is 60	1	(.2)	
To enjoy time with spouse; spouse retires then; time for family	21	(5.2)	+3
It's the traditional age; seems realistic; the official age; it's a good age; make room for a younger person	27	(6.7)	+1

Other Roles Important in Present Life
(Question 46)

"Everything"	22	(28.2)
Travel	14	(17.9)
Teaching	11	(14.1)
Pet owner	6	(7.7)
Student	6	(7.7)
Real estate; home improvement or construction	6	(7.7)
Hobbies	4	(5.1)
Business owner; self-employment	3	(3.8)
Homemaker	3	(3.8)
Friend; sensitive, caring person	3	(3.8)

Other Educational Attainment
(Question 51)

College study beyond bachelor's degree but not resulting in additional degree	11	(26.2)
Associate degree as library tech; associate degree in art	6	(14.3)
Three-year diploma: theology; nursing	6	(14.3)
Fifth year nursing or teaching certificate	5	(11.9)
Registered nursing diploma	4	(9.5)
Apprenticeship; beauty school	3	(7.1)
G.E.D. (high school equivalence)	3	(7.1)
Four-year electronics school	2	(4.8)
Certified public accountant	1	(2.4)
Internship	1	(2.4)

Planned Age of Retirement

Under 62	175	(29.4%)
62-64	88	(14.8%)
65-67	155	(26.0%)
Over 67	69	(11.6%)
Don't know	54	(9.1%)
Blank	54	(9.1%)

Years to Retirement

(Computed by subtracting present age from planned age of retirement, question 42)
(n=488)

0 - 4 years	9	(1.7%)
5 - 9	81	(16.6%)
10 - 14	131	(26.9%)
15- 19	99	(20.3%)
20 - 24	88	(18.0%)
25 - 29	49	(10.1%)
30 - 34	14	(2.7%)
35 or more	17	(3.5%)

Mean = 16.41

AGGREGATED VARIABLES

Importance of Job in Meeting Needs

(Question 4 aggregated and broken down into 6-unit increments)

Unimportant	22	(3.7%)
	36	(6.0%)
	58	(9.7%)
	88	(14.8%)
	139	(23.3%)
	166	(27.9%)
	66	(11.1%)
Extremely Important	21	(3.5%)

Severity of Problems Encountered on Job

(Question 5 aggregated and broken down into 5-unit increments)

Few Problems	142	(23.8%)
	139	(23.3%)
	95	(15.9%)
	75	(12.6%)
	68	(11.4%)
	35	(5.9%)
	20	(3.4%)
	22	(3.7%)

Involvement in Roles Outside the Job

(Question 46 aggregated and broken down into 10-unit increments)

Least outside interests	16	(2.7%)
	10	(1.7%)
	18	(3.0%)
	97	(16.3%)
	182	(30.5%)
	164	(27.5%)
	84	(14.1%)
	18	(3.0%)
	6	(1.0%)
Most outside interests	1	(.2%)

APPENDIX B:

Interview and Responses

Personal Interview Reduced from 9 1/2" x 14"

Hello, I'm calling for the Long Range Career Planning Study of the Institute for Public Policy and Management. May I ask you a few questions? This is a follow-up to a questionnaire you may have received about five months ago. It'll take about ten minutes. Is this a good time?

1. During the last two months or so, have you signed up for any classes or workshops that would affect your job or your plans for work in the future?

1a. [If yes]: Could you give me some idea of what kind of classes or workshops these were?

NO . . . 71 (59.2%)
CAREER TRAINING 28 (23.3)
INTENDED; TRIED 9 (7.5)
GENERAL EDUCATION 9 (7.5)
CAREER PLANNING 2 (1.7)
TO DEVELOP SKILLS FOR RETIREMENT 1 (.8)

2. During the last few months, have you thought at all about possibly trying to change jobs?

NO 54 (44.6%)
RATERACED 19 (15.7)

2a. [If yes]: What caused you to consider changing jobs?

DISSATISFIED 16 (13.2)
BUDGET CUTBACK OR FEAR OF CUTBACK 12 (9.9)
SEEK GREATER SATISFACTION 9 (7.4)
RELIEVE PRESSURE 5 (4.1)

2b. [If "don't know," probe]: Have you any idea at all?

UNRELATED EVENT 4 (3.3)
VALUE CHANGE 1 (.8)
SPOUSE TRANSFER 1 (.8)
ALREADY WORK PART TIME 14 (11.7)

3. Do you think that at any time before retirement you may be interested in changing to less demanding duties or to a work schedule that's less then full time?

NO: NEED OR LIKE AS IS 62 (55.1)
WOULD LIKE REDUCED HOURS 30 (26.6)
ALREADY PART TIME 14 (11.8)

3a. [If yes]: What do you think you might do?

LESS DEMANDING WORK 9 (7.9)
IF COULD AFFORD IT 2 (1.8)
CUT MONTHS PER YEAR 2 (1.8)

3b. At what age might you do that? MEAN: 51.33 MEDIAN: 50.42 MODE 60.0

[Ask all]: Do you have any particular reason for feeling that way?

WANT TIME TO PURSUE INTERESTS 26 (25.7)
ENJOY PRESENT WORK; HAVE VARIETY 21 (20.8)
WANT WORK AND MONEY OF PRESENT JOB 13 (12.9)
STAY ACTIVE AND NOT BE BORED 8 (7.9)
PRESSURE; AM TIRED 8 (7.9)
PROTECT RETIREMENT INCOME 7 (6.9)
BETTER FOR HEALTH 4 (4.0)
WANT TO CHANGE TO FULL TIME 3 (3.0)
TOO RECENTLY JOINED WORKFORCE 1 (1.0)

4. How much do you think each of the following will influence your decision for or against changing to a less demanding job or a job that was not full time?

[Probe any that have not been mentioned and try to pin to degree]:

	A Great Deal	Somewhat	Slightly	Not at all
4a. Do you think family demands would influence your decision?	29 (25.9%)	14 (12.5%)	9 (8.0%)	59 (52.7%)
4b. Would your decision be influenced by the amount of income tax you pay? [If yes, probe]: In what way? Would your main consideration be the general amount of taxes you have to pay or your tax bracket? D.K. 2 (1.8%)	10 (9.0)	11 (9.9)	7 (6.3)	81 (73.0)

4c. What other reasons would be likely to influence your decision? . . . .

HEALTH; STRESS 31 (36.5)
DEVELOP OR PURSUE INTERESTS 21 (24.7)
TYPE OF WORK 11 (12.9)
FINANCIAL ASPECTS 11 (12.9)
DISABIL. OR TRANSFER OF SPOUSE 4 (4.7)
ADJUSTMENT TO FREEDOM 2 (2.4)
LIKE TOUGH WORK 2 (2.4)
DON'T WANT TO JEOPARDIZE JOB 1 (1.2)
OTHER 1 (1.2)

5. Have you ever thought at all about your retirement?

YES 82 (67.8%) SLIGHTLY 20 (16.5) NO 19 (15.7)

5a. [If yes]: During the last few months, have you thought at all about your retirement?

YES 80 (68.5) NO 32 (27.4) SLIGHTLY 5 (4.3)

5b. [If yes]: Could you give me some idea of what you were thinking about?

ADEQUACY OF INVESTMENTS TO MEET NEEDS 42 (46.7%)
WHAT TO DO; HOW TO USE EXISTING SKILLS 12 (13.3)
OPTIONS AS TO AGE TO RETIRE 9 (10.0)
REORIENTING TO RETIREMENT LIVING; RELOCATING 8 (8.9)
WHETHER TO SACRIFICE RETIREMENT CREDIT AND CHANG JOB 6 (6.7)
SOLVENCY OF SOC. SECURITY AND/OR RETIREMENT PLAN 6 (6.7%)
CAREER CHANGE; PART TIME JOB 3 (3.3)
FAMILY DEMANDS 2 (2.2)
AGE 1 (1.1)
LOOKING FORWARD TO RETIREMENT 1 (1.1)

[If no specifics or if work-related aspects not mentioned]: Were you

thinking about when you'd retire?	71(67.6) Yes	No 33 (36.4)
or about what you'd do then?	68(64.2) Yes	No 36 (34.0)
or about whether your present work or hobbies or other interests will prepare you for what you want to do as you get older?	65(62.5) Yes	No 38 (36.5)

6. At what age do you think you're likely to retire? MEAN: 61.66 MEDIAN: 62.5 MODE: 65

6a. Do you consider that a pretty firm plan? NO; NO PLAN 57(47.8%) FAIRLY 5(4.2) YES 55(47.1%)

6b. What might change that plan?

OWN OR SPOUSE'S HEALTH	38 (36.5%)	"SIGNIFICANT OTHERS"	15 (14.4)	DEVELOPMENTS ON JOB	6 (5.8)
CHANGE IN PROVISIONS CONCERNING SOCIAL SECURITY, RETIREMENT SYSTEM OF MANDATORY RETIREMENT	15 (14.4)	FINANCES & AFFORDABILITY	13 (12.5)	OPPORTUNITY; EMPLOYMENT	5 (4.8)
		OTHER INCOME OR BENEFITS	8 (7.7)	OWN OR SPOUSE'S DEATH	2 (1.9)
				GROWTH OF INTERESTS	1 (1.0)
				HAVE FLEXIBILITY NOW	1 (1.0)

6c. [Probe]: Do you think any of the following will influence your decision when to retire? [Try to pin down to degree]

	A Great Deal	Some-what	Slightly	Not at all	DK.
The age at which you can get full social security benefits?	37(30.8%)	28(23.3)	13 (10.8)	39(32.5)	
The age at which you can get partial social security benefits?	11(9.2%)	35(29.2)	14 (11.7)	57(47.5)	3(2.5)
The social security earnings test (that is, the limit in what you can earn without losing part of your social security?	31(25.8)	30(25.0)	10(8.3)	46(38.3)	3(2.5)
The limit in hours you can work and still get retirement benefits?	25(20.7	32(27.1)	10(8.5)	41(34.7)	10(8.5)
The extra money for postponing retirement beyond the age at which you're eligible for full retirement?					
The income tax you have to pay. [Probe: In what way, see q.4]	16(13.3)	30(25.0)	18(15.0)	50(41.7)	6(5.0)

TAX BRACKET	29 (46.0%)	DON'T KNOW	8 (12.7%)
GENERAL TAX LEVEL	16 (25.4)	HAVE TAX SHELTERS	1 (1.6)
NET INCOME IS WHAT COUNTS	9 (14.3		

7. Do you have any concerns about your retirement? Yes (go to 7a) No (go to 7b)

7a. [If yes, probe]: Could you give me some idea of those concerns?]

NO	43 (37.4)	HOW TO KEEP BUSY	8 (7.0)	FINANCES AND FULFILLMENT	2 (1.7%)
FINANCES; INFLATION; BENEFITS	33 (28.7)	HEALTH; INJURY	6 (5.2%)	LONELINESS	2 (1.7%)
SOUNDNESS OF THE SYSTEM	15 (13.0)	SELF WORTH; HOW TO CONTRIBUTE	3 (2.6)	DONT KNOW ENOUGH ABOUT IT	1 (.9)

7b. [If no, probe]: Do you think that's because you just haven't thought much about it or are you fairly confident that you've planned adequately?]

HAVE PLANNED	27 (55.1%)	NOT PRINCIPAL EARNER; PLANS DEPEND ON SPOUSE	2 (4.1)
NO; HARDLY AT ALL	13 (26.5)	LIVE FOR TODAY; NO POINT PLANNING	1 (2.0)
INSUFFICIENT PLANNING	5 (10.2)	WON'T EVER RETIRE	1 (2.0)

8. Do you plan to work after you retire? [If no, skip to 8e]

8a. [If yes]: What's the main reason you think you'll work? NOTE: TOTALS OVER 100% BECAUSE OF MULTIPLE RESPONSES

KEEP ACTIVE; MEANINGFUL WORK	60 (44.6%)	LOVE WORK; INTERESTED	9 (8.0)	FOR CONTACT W/ PEOPLE	4 (3.6)
NO WORK AFTER RETIRE	14 (12.5)	CONTRIBUTION; SOC. ACCEPTANCE	6 (5.4)	FAMILY TRADITION	1 (.9)
FINANCIAL	20 (16.6)	ONLY IF FINANCES DICTATE	4 (3.6)		
		IF OPPORTUNITY ARISES	4 (3.6)		

8b. How much do you think you'll work?

LESS THAN HALF TIME	34 (35.8%)	D.K.	6 (6.3)	WITHIN SOC. SECURITY LIMITS	2 (2.1)
BUT LESS THAN FULL TIME	36 (37.9%)	FULLTIME OR ALMOST	13 (13.7)	OWN BUSINESS	2 (2.1)
				PART YEAR	2 (2.1)

8c. Do you think your work will be related to your present work?

YES, RELATED	37 (37.8%)	PERHAPS; DON'T KNOW	23 (23.5)
NO, NOT ALL	28 (28.6)	SOME RELATED	10 (10.2)

8d. Do you think your work will be related to work you plan to change to before retirement? DON'T PLAN TO CHANGE 56 (57.7%)

PERHAPS	22 (23.2%)	PLAN TO CONTINUE IN A BUSINESS TO BE STARTED BEFORE RETIREMENT	4 (4.2)
YES, RELATED	13 (13.7%)		

8e. [Ask all] What will be the main influence on (whether) how much you work?

INCOME AND NEED	9 (29.0%)	FINANCES + HEALTH	5 (16.1)
HEALTH (SELF + SPOUSE)	6 (19.4)	BOSS' ATTITUDE	3 (9.7)
PREFERENCES + PRIORITIES	5 (16.1)	INFLATION; ECONOMY	3 (9.7)

	A Great Deal	Some-what	Slightly	Not at all	DK.
8f. Do you think the income taxes you have to pay will influence your decision? [Probe: In what way, see q. 4]	21(17.6%)	21(17.6%)	8(6.7%)	60(50.4%)	6(5.0)
8g. Do you think the social security earnings test will be an important influence on your decision?	28(23.5)	35(29.4)	8(6.7)	45(37.8)	2(1.7)
8h. Do you think the limit on hours you can work and still be eligible for retirement benefits will be an important influence on your decision?	36(30.3)	29(24.4)	7(5.9)	39(32.8)	4(3.4)

8i. [If no work] How do you think you're likely to spend your time after you retire?

RECREATION; FRIENDS; HOME	16 (34.0)	D.K.; HAVEN'T CONSIDERED	4 (8.5)	GRADUALLY DEVELOP WORK OR VOLUNTEER WORK	1 (2.1)
VOL. WORK; SALEABLE CRAFT	13 (27.7)	TRAVEL	4 (8.5)	STUDY	1 (2.1)
VOCATION-RELATED WORK	5 (10.6)	NO WORK, THAT'S ALL	2 (4.3)		

8j. Are you looking forward to that?

YES	58 (48.3%)	MIXED FEELINGS	9 (7.5%)	WILL WHEN TIME COMES	3 (2.5%)
NO	42 (35.0)	JUST ANOTHER PHASE OF LIFE	4 (3.3)	WON'T RETIRE	2 (1.7)
				DON'T KNOW	2 (1.7)

APPENDIX C:

Demographic and Occupational Characteristics

Demographic Characteristics of Questionnaire Sample, Interview Sample and Workshop Participants (Percentages)

OCCUPATIONAL CLASSIFICATION

	n=	Admin.	Prof'n'l	Paraprof./ Tech.	Sec- urity	Cler./ Secr't'l	Skilled Crafts	Maint./ Service
Questionnaire	596	10.9	22.2	9.6	2.5	37.5	5.0	12.4
Interview	121	13.2	22.3	11.6	2.4	25.6	9.9	14.9
Workshop	32	12.5	21.9	12.5	---	28.1	12.5	12.5

SEX

	n=	Male	Female
Questionnaire	596	38.3	61.7
Interview	121	33.3	66.7
Workshop	32	28.1	71.9

MARITAL STATUS

n=	Married	Unmarried	Divorced	Widowed
579	65.6	10.7	19.7	4.0
90*	64.4	8.9	22.2	4.4
38	48.4	16.1	32.3	3.2

ETHNIC BACKGROUND

	n=	Caucasian	Black	Asian	Native American	Hispanic
Questionnaire	596	82.9	4.9	9.2	1.2	1.8
Interview	121	83.3	4.2	9.2	2.5	.8
Workshop	32	87.5	3.1	6.3	3.1	---

EDUCATIONAL ATTAINMENT

	n=	No. H.S. Diplomas	H.S. Grad.	Some College or Voc't'l School	Bachelor	Advanced Degree
Questionnaire	561	3.4	7.8	44.2	25.5	19.12
Interview	91*	3.3	6.6	45.1	28.6	16.5
Workshop	32	---	6.3	53.1	25.0	15.6

---

* Data not available for group 4 (non-questionnaire recipients).

Demographic Characteristics
(continued)

	AGE				PART TIME OR FULL TIME		
	n=	Mean	Median	Mode	n=	Full time	Part time
Questionnaire	561	45.85	46.135	49	596	90.0	10.0
Interview	121	45.176	44.75	36	121	86.0	14.0
Workshop	75	45.04	44.917	39	75	100.0	----

ACCRUED RETIREMENT CREDIT

	n=	Mean	Median	Mode
Questionnaire	561	7.446	6.078	2.00
Interview	121	6.035	4.35	1.00
Workshop	75	7.027	6.125	1.00

Demographic Characteristics of Interviewees by Group
(as percent of total interviewees in the group)

OCCUPATIONAL CLASSIFICATION

		Admin.	Prof'n'l	Paraprof./ Tech.	Sec- urity	Cler./ Secr't'l	Sk'l'd Crafts	Maint/ Service
	n=	16	27	14	3	31	12	18
Group 1: Attended Workshop	32	12.5	21.9	12.5	---	28.1	12.5	12.5
Group 2: Interested, but didn't attend	32	9.4	21.9	12.5	3.1	25.0	9.4	18.8
Group 3: Not interested	30	23.3	20.0	6.7	6.7	23.3	3.3	16.7
Group 4: No questionnaire	27	7.4	25.9	14.8	---	25.9	14.8	3.3

SEX

		Male	Female
	n=	40	80
Group 1:	32	28.1	71.9
Group 2:	31	32.3	67.7
Group 3:	30	36.7	63.3
Group 4:	27	37.0	63.0

PART TIME OR FULL TIME

	Part time	Full time
n=	104	16
Group 1:	96.9	3.1
Group 2:	87.1	12.9
Group 3:	80.0	20.0
Group 4:	81.5	18.5

AGE

		36-40	41-45	46-50	51-55	Mean
	n=	32	29	29	31	
Group 1:	32	25.0	25.0	25.0	25.0	45.34
Group 2:	32	25.0	25.0	25.0	25.0	45.34
Group 3:	30	26.7	26.7	23.3	23.3	45.0
Group 4:	27	29.6	18.5	22.2	29.6	44.96

Demographic Characteristics of Interviewees by Group
(continued)

ETHNIC CATEGORY

		Caucasian	Black	Asian	Native American	Hispanic
	n=	100	5	11	3	1
Group 1:	32	87.5	3.1	6.3	3.1	---
Group 2:	31	80.6	3.2	6.5	6.5	3.2
Group 3:	30	73.3	6.7	20.0	---	---
Group 4:	27	92.6	3.7	3.7	---	---

MARITAL

		Married	Unmarried	Divorced	Widowed
	n=	58	8	20	4
Group 1:	31	48.4	16.1	32.3	3.2
Group 2:	31	64.5	9.7	16.1	9.7
Group 3:	28	82.1	---	17.9	---
Group 4:	Not available; derived from questionnaire response.				

FORMAL EDUCATIONAL ATTAINMENT

		Not high sch'l grad.	High Sch'l grad.	Some college, bus. or voc't'l sch'l.	Bachelor's degree	Advanced degree
	n=	3	6	41	26	15
Group 1:	32	---	6.3	53.1	25.0	15.6
Group 2:	30	3.3	6.7	53.3	23.3	13.3
Group 3:	29	6.9	6.9	27.6	37.9	20.7
Group 4:	Not available; derived from questionnaire response.					

ACCRUED RETIREMENT SERVICE CREDIT

		Less than 5 years	5-9 years	10-14 years	15-19 years	20-24 years	25 years or over
	n=	52	23	27	12	4	3
Group 1:	32	31.3	21.9	25.0	12.5	6.3	3.1
Group 2:	32	65.6	6.3	15.6	6.3	---	6.2
Group 3:	30	26.7	26.7	33.3	13.3	---	---
Group 4:	27	48.1	22.2	14.8	7.4	7.4	---

Demographic Characteristics of Interviewees by Group
(continued)

		YEARS TO RETIREMENT					
		Less than 5 years	5-9 years	10-14 years	15-19 years	20-24 years	25 years or over
	n=	24	13	25	22	17	20
Group 1:	32	15.6	15.6	21.9	9.4	25.0	12.5
Group 2:	32	25.0	9.4	12.5	34.4	6.3	12.5
Group 3:	30	10.0	10.0	23.3	20.0	16.7	20.0
Group 4:	27	29.6	7.4	25.9	7.4	7.4	22.2

APPENDIX D:

Workshop Materials

Colloquium to Plan Workshop on
RETIREMENT ORIENTED CAREER PLANNING
1:15 p.m. - November 19, 1980
Institute of Governmental Research Conference Room
3935 University Way N.E.

AGENDA

Discussion of components planned for workshop and of format to be used.

IMPORTANT! Please bear in mind that we do not propose to provide a comprehensive picture of related institutional considerations such as retirement provisions or a thorough exercise in values clarification or career planning. We do have as our objective to create a strong awareness of the principal related institutional factors and to give participants a start at evaluating their anticipated needs over the next 20 years or so and the adequacy of their jobs in meeting those needs. In short this is intended to provide participants with just enough exposure to the relevant considerations so that they will want, or preferably feel an urgent need to undertake a thorough exercise in career planning with due regard for their long-term needs and will know where to turn to get the help they need in that effort.

I. Principal areas to be covered

A. Statement of basic question of satisfaction with existing work and its adequacy for the long term.

1. Need to develop confidence in self and in ability to bring about changes for the better.

2. Exploration of personnel values; needs; skills; desire for training; desire for job redesign with respect to type of components, pace or schedule.

3. Reevaluation of career plan in light of these values and of anticipated needs as person grows older

B. Description of existing related institutional considerations

Union regulations
Hiring procedures; transfer procedures; training available for transfer
Training for advancement
Job rescheduling mechanisms
Job redesign mechanisms
Retirement and insurance considerations and financial planning
Long-range career planning services

II. Format

A. For each item, the following questions require resolution:

1. Lecture vs. (participatory) exercise
2. Individual vs. group
3. Structured (e.g. using work sheets) or free form
4. Length of time per session } Consider 3 hour per week UW maximum and
5. Number of sessions } saturation point vs. need for continuity
6. Should there be a separate workshop for unskilled blue-collar workers so as to make them comfortable about participating freely?
7. Who should best handle it?

B. Number of participants per workshop.

C. Should a supervisors' workshop be offered? If so, what content?

D. What form of publicity to attract participants?

E. Date(s), time(s) and place(s) for workshop(s).

INSTITUTE OF GOVERNMENTAL RESEARCH

Long-Range Career Planning Workshop

WORKSHOP PREREGISTRATION

Thank you for returning our questionnaire and expressing interest in our workshop.

The workshop will be held three times in order to accommodate as many people as possible. All three workshops will be held at the South Campus Center from 9 to 12 a.m. If you like, you may bring a brown-bag lunch and stay after 12 to talk to U.W. staff representatives having responsibilities related to various aspects of the workshop content (e.g., employment, training, retirement, union policies).

Because of the great response, admission will be by preregistration only. Please mark next to each of the following workshop times whether it is your first choice, second choice, third choice, or an impossible time for you.

Date	Preference Rating
February 12	______________________________
February 20	______________________________
February 25	______________________________

You will receive notification of the session for which you are scheduled.

We want to make sure the workshop comes as close as possible to addressing the needs of participants. Please help us by answering the following questions:

1. Is there any particular aspect of career planning that interests you especially, or any particular question you would like answered?

2. We would like to make the process we're describing as clear as possible and think this can best be done by using real live examples. Please check the box if you would be willing to serve as a model for a career-planning exercise at the workshop you attend. Yes, I'll serve as a model /___/.

If you have any questions, don't hesitate to call Susie Anschell at 543-0190.

______________________	______________________	
Name	Mail stop	Phone #

PLEASE NOTE: Because there are not enough places to take care of all the people who said they were interested, we will have to assign your place to someone else unless this form is returned by JANUARY 30.

Getting to Know Yourself:

First, you must know something about yourself so you can make career and life planning decisions which will bring the most personal satisfaction. Everyone has a unique combination of skills and interests. Sometimes these can be combined into a satisfying job or leisure activity. Self-exploration will lead to the discovery of careers and leisure activities which are just right for you.

1. List 5 most satisfying Accomplishments

   a. (Organized a meeting joining two girl scout troops.)

b b.

   c.

   d.

   e.

a. List Hobbies or Interests

   a. (painting)

   b.

   c.

   d.

   e.

LOOK AT THE ABOVE, AND LIST SKILLS YOU NOW HAVE

A. (painting - artistic abilities)

B. (ability to organize)

C.

D.

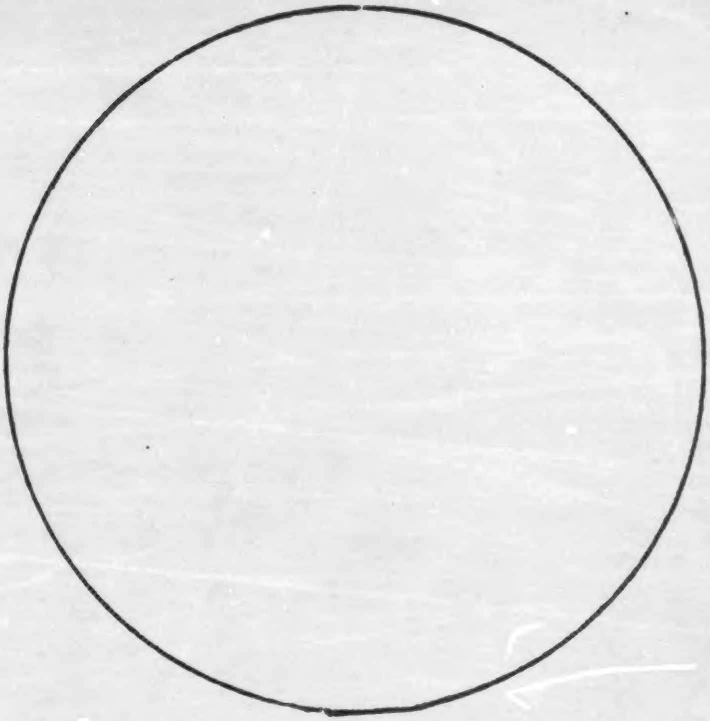
E.

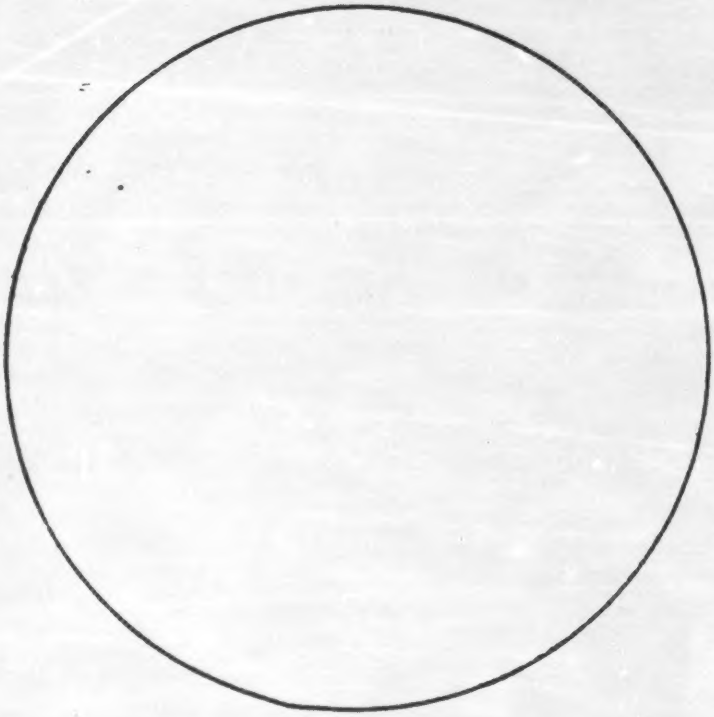
DECISION-MAKING

GRID

VALUE	AMT.						
1.		☐	☐	☐	☐	☐	
2.		☐	☐	☐	☐	☐	
3.		☐	☐	☐	☐	☐	
4.		☐	☐	☐	☐	☐	
5.		☐	☐	☐	☐	☐	
6.		☐	☐	☐	☐	☐	
TOTALS		☐	☐	☐	☐	☐	

Across top: different career paths (or other options).
Items 1 through 6: important criteria, with importance assigned under "AMT."
For each alternative career path (or other decision) considered, a numerical value is assigned to reflect the extent to which each criterion at left is met. These numerical values are weighted according to the importance assigned the respective criteria and the weighted value is entered in the small (square) boxes. Absolute and weighted totals are then calculated, allowing comparison of the different options.
Each participant received two of these, with the extra one earmarked for his or her spouse.





STEPS IN MAKING A DECISION

Decide whether or not you have a decision to make

Research the problem thoroughly

Define the alternatives

Weigh the choices

Evaluate the decision you have made

Don't be afraid to change your mind

Have an accountability date

Use circles for pie charts to represent present time allocation to different activities as a proportion of 24-hour or other appropriate time period. One is for status quo, the other for an alternative path being considered. Still another pie chart could be used to indicate optimal time allocation and serve as a guide to selecting a combination of activities that would accommodate that allocation.

Ten Years From Now

Can you imagine what your life will be like ten years from now? How would you like it to be?

Where I live

What I'm doing

How I look

Who I'm with

State of Mich., Higher Education
Personnel Board

Where I've traveled

My proudest moments

Things I own

How the world has changed

A typical Saturday

A typical weekday

ANALYZING SELECTED SEGMENTS OF YOUR LIFE ACCORDING TO PRE-DETERMINED FAMILIES OF SKILLS

(Adapted from a technique invented by Bernard Haldane)

THE FAMILY OF SKILLS	YOUR SEVEN MOST SATISFYING ACCOMPLISHMENTS							
Did each satisfying accomplishment employ any in the following family of skills? If so, put a check ( ).	1.	2	3	4	5	6	7	Total
Assembling, building, fixing, repairing, operating tools or machiner, typing or filing, showing dexterity or speed.								
Writing, reading, copying, talking, debating, speaking, negotiating, teaching or training, public speaking, communicating, publicizing.								
Observing, inspecting, examining, determining, judging, evaluating, deciding, diagnosing.								
Researching, analyzing, organizing, systematizing, problem-solving, trouble shooting, remembering.								
Imagining, inventing, creating, developing, designing, creatively imagining, being an idea (wo)man.								
Being kind, being of service, helping people, interviewing, consulting, rendering services to.								
Showing courage, taking risks, initiating, organizing, leading, managing, directing others, controlling, coordinating.								
Counting, calculating, keeping financial records, figuring, doing accounting.								
Having endurance, persevering, demonstrating follow-through, producing, showing attention to details.								
Dealing creatively with colors, shapes, spaces, faces, painting, drawing, composing, doing hendicrafts, art, shaping.								
Persuading, reconciling, selling, promoting, influencing others.								
Performing, acting, making people laugh, getting up before a group, playing music, demonstrating.								
Showing foresight, perceiving, planning, policy-making, balancing.								
Creating, planning or doing physical or outdoor activities, sports, traveling, camping, playing.								
Making models, executing from blue-prints or patterns, visualizing in three dimensions.								
Others (Your own families, not included in the above).								

Institute of Governmental Research
Long-Range Career Planning Workshop

EVALUATION

Please complete this evaluation. Your remarks will guide us in fine-tuning the workshop content and format for the benefit of future participants.

1. Did the workshop have the general focus you were expecting? (If not, please explain.)

2. What did you find most useful about the workshop?

3. Did we leave out any areas you had hoped we would cover?

4. Would you recommend a similar workshop to your best friend? (Please explain.)

5. We would appreciate any further comments or suggestions you may have on either the content or the manner of presentation. Please be as specific as you can (continue on to back of page if necessary).

Name (optional)____ Phone__________

THANK YOU FOR YOUR HELP. Please send this evaluation via campus mail to Long-Range Career Planning Study, JM-10.

APPENDIX E

Changes in Planned Age of Retirement and Work After Retirement, by Group

Difference in Planned Age of Retirement from Questionnaire to Interview as a Percentage of Total Group Response

		Up 6-10 yrs.	Up 1-5 yrs.	Unchanged	Down 1-5 yrs.	Down 6-10 yrs.	Down over 10 yrs.
	n=	4	17	28	16	4	3
Group 1	24	4.2	20.8	41.7	25.0	8.3	---
Group 2	23	8.7	30.4	39.1	8.7	4.3	8.7
Group 3	25	4.0	20.0	36.0	32.0	4.0	4.0

Difference in Work Plans from Questionnaire to Interview As a Percentage of Total Group Response (Questionnaire q. 45, Interview q. 8)

		Work Plans Down	Unchanged	Work Plans Up
	n=	34	56	4
Group 1	32	37.5	62.5	----
Group 2	32	28.1	68.8	3.1
Group 3	30	43.3	46.7	10.0